

# 2017



## MISSOURI ECONOMIC REPORT

# Table of Contents

“Show Me” the facts	1
Current Trends	2
Missouri Economy Defined	3
Regional Analysis	7
Central Region	9
Kansas City Region	14
Northeast Region	19
Northwest Region	24
Ozark Region	29
South Central Region	34
Southeast Region	39
Southwest Region	44
St. Louis Region	49
West Central Region	54
Data Sources	59
Appendix	1



## “Show Me” the Facts

- Missouri's GDP totaled \$263.9 billion in 2016 in inflation-adjusted dollars—a 1.1 percent increase over the previous year.
- Between June 2016 to June 2017, Missouri added over 46,600 jobs, a 1.6 percent employment growth for Missouri.
- Missouri's per capita personal income was \$44,520 in the 1st Quarter 2017, up 3.2 percent from the 1st Quarter 2016.
- In June 2017, Missouri's unemployment rate was 3.8 percent, its lowest level since September 2000.
- Missouri has a higher labor force participation rate than the nation: 65.8 percent compared to 62.8 percent. Nationally, as well as statewide, the number of older Americans (65+) staying in the labor force is increasing.
- The *Health Care & Social Assistance* industry employed the most people in Missouri, with 395,300 employee in 2016. *Retail trade* was second (315,900), and *Manufacturing* was third (263,400).
- *Management of Companies* was the most concentrated industry sector in Missouri, with a location quotient of 1.5 in 2016.
- The *Health Care & Social Services* industry added 8,146 jobs to the Missouri economy in 2016. *Professional and Technical Services* added nearly 7,000 and *Construction* added over 6,000. The *Information* sector lost around 500 jobs, and was the industry with the largest job decline.
- *Health Care* and *Business & Sales* related jobs are the most in-demand occupations based on a measure of on-line job advertisements. In the St. Louis Region, *Science & Technology* jobs have the most job ads.
- The Kansas City Region had the highest employment growth rate in 2015 (2.8 percent), adding over 15,100 new jobs. The St. Louis Region grew at 1.3 percent and the Northeast Region grew at 1.2 percent.



## Current Trends

Missouri's economy saw its fifth consecutive year of Annual Real GDP growth in 2016 with GDP growth continuing into Quarter 1 of 2017. The Missouri economy added 46,600 jobs from June 2016 to June 2017 with *Health Care and Professional, Scientific & Technical Service* jobs leading the job growth.

In June 2017, the Missouri unemployment rate reached it's lowest point since September 2000 and Civilian Labor Force participation continues to grow, which points to a tightening of the labor market. This is helping to drive wage increases for Missouri workers, although it could lead to a lack of qualified workers, especially for in-demand occupations.

Kansas City was the fastest growing region in Missouri, outpacing the state average growth rate by 1.5 percentage points. Most other metropolitan areas had employment growth rates between 1.1 and 1.3 percent. More rural areas saw lower levels of employment growth with the Southeast, Southwest, and West Central parts of Missouri showing declining employment in 2016.

In this annual review of the Missouri economy, changes in gross state product, personal incomes, civilian labor force, unemployment, and employment are analyzed for the current period and more broadly over the last ten years. Moreover, in this review, special attention is paid to economic regions within Missouri—their diverse workforce and economies.

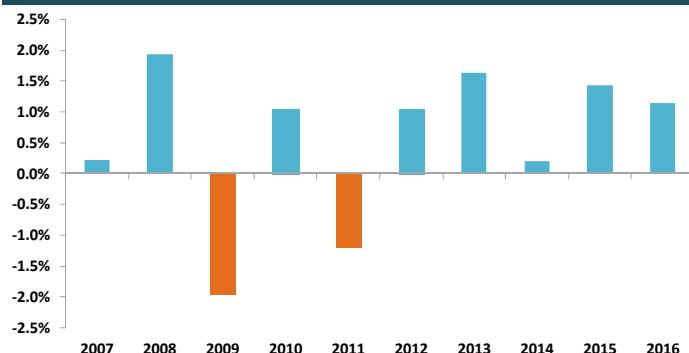


# Missouri Economy Defined

**G**ross Domestic Product (GDP) is the broadest measure of economic activity. This measure tracks the market value of goods and services produced within a nation or state for a particular period of time. In 2016, Missouri's GDP was \$263.9 billion (in 2009 constant dollars); this is a 1.1 percent increase over 2015. Nationally, GDP increased 1.5 percent over the same period.

Most industry sectors show GDP growth trends from 2007 to 2016. Slower trends with periodic downturns can be seen in the *Agricultural* and *Natural Resources & Mining* sectors. The *Information* sector shows a downward trend from 2013 with a slight pick-up in 2016. From 2012 to 2016, Missouri industries produced a total \$11.3 billion more in goods and services—growing at an annualized 1.1 percent per year.

**Missouri Real Gross State Product  
Annual Growth Rate**



Source: U.S. Bureau of Economic Analysis, real GDP in chained dollars,

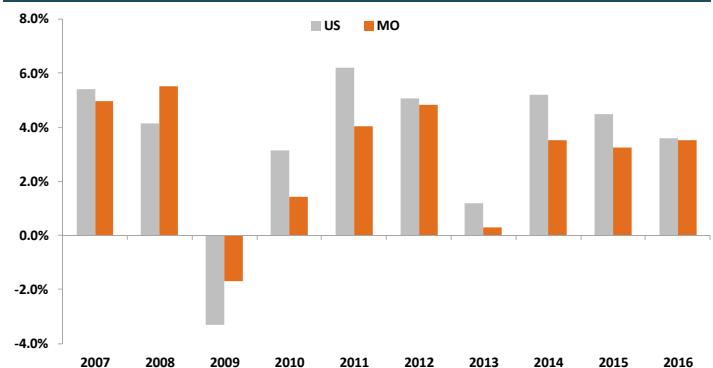
Missouri's annual growth rate maintains an upward trend nearly seven years after the recession. In 2014, Missouri experienced slower growth stemming from a sluggish first quarter, but in 2015, state GDP was 1.4 percent, climbing 1.2 percent higher than the 0.2 percent annualized growth rate of 2014. In 2016, that number dropped slightly to 1.1 percent.

The state's GDP change from 2015 to 2016 performed better than some surrounding states including: Oklahoma (-2.3 percent), Kansas (0.2 percent), Arkansas (0.8 percent), Iowa (0.9 percent), and Illinois (0.9 percent). However, Nebraska (1.2), Kentucky (1.3) and Tennessee (2.0) each had slightly higher growth rates for 2016.

**P**er Capita Personal Income is a rough indicator of the economic well-being of an area's residents. Per capita income is calculated by dividing an area's total personal income by its population. The average annual income of a Missouri citizen in 2016 was \$43,723 and nationally it was \$49,571. While the state's per capita income is lower than the national average, so is the cost of living. In 2016, Missouri ranked 11th in cost of living for states.

The pace of income growth at the national level has generally been faster than Missouri's, though the state patterns the nation in positive growth. From 2010 to 2016, annual growth rates show that the U.S. total personal incomes increased an average 4.3 percent and Missouri total personal incomes increased an average 3.2

**Personal Income Annual Growth Rate**

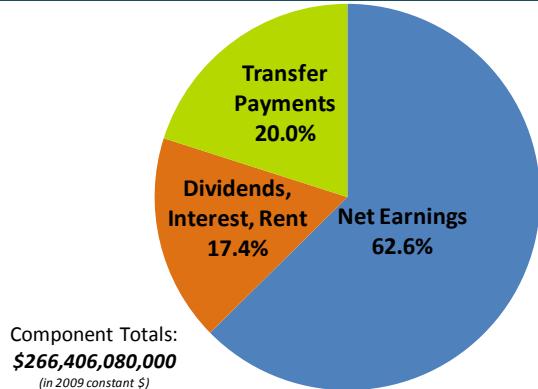


Source: U.S. Bureau of Economic Analysis,

percent. Among surrounding states, Illinois, Kansas, and Kentucky each increased over 3 percent average as well.

2016; and statewide, from 16.8 percent to 20.1 percent. Social Security and Medicare make up the largest share of transfer payments.

### Missouri Components of Personal Income



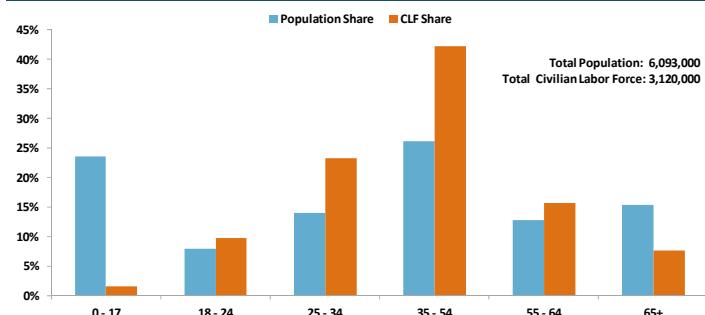
Source: U.S. Bureau of Economic Analysis, 2016

Total personal income includes the wages and salaries of workers and other income received such as dividends, interest, rent, and transfer payments. Transfer payments refer to Social Security, Medicare and Medicaid, Unemployment Insurance, and other government benefits. Incomes are reported before the deduction of taxes. Since 2007, Missouri personal incomes have increased an average of 1.2 percent annually; at the national level, incomes have increased 1.8 percent on average.

Twenty percent of total personal income is transfer payments. Transfer payments are monies paid out by government to individuals through Social Security, Disability Insurance, Medicare, Unemployment Insurance compensation, Veterans benefits, Education and Training Assistance programs (Pell Grants for example), and low-income assistance benefits (which include SSI, Medicaid, CHIP, and TANF). The Federal government made roughly \$2.8 trillion in transfer payments in 2016 with Missouri residents seeing about \$53.4 billion in such payments. Over the last ten years, the transfer payments share of total personal income has grown by 3 percentage points; nationally, from 14.4 percent in 2007 to 17.4 percent in

**C**ivilian Labor Force is defined as the number of non-institutionalized persons—16 years and older—who are either gainfully employed or are unemployed but actively seeking work, which totals 3.1 million in Missouri for 2016. According to data from the Bureau of Labor Statistics, in 2016 the 35 to 54 age cohort comprise 26 percent of Missouri’s population and 42 percent of its civilian labor force. The 65+ age cohort makes up 15 percent of the population and nearly 8 percent of the civilian labor force. Five years earlier, in 2010, the 65+ age cohort comprised 13 percent of the state’s population and nearly 4 percent of the civilian labor force.

### Missouri Population and Labor Force By Age Cohort



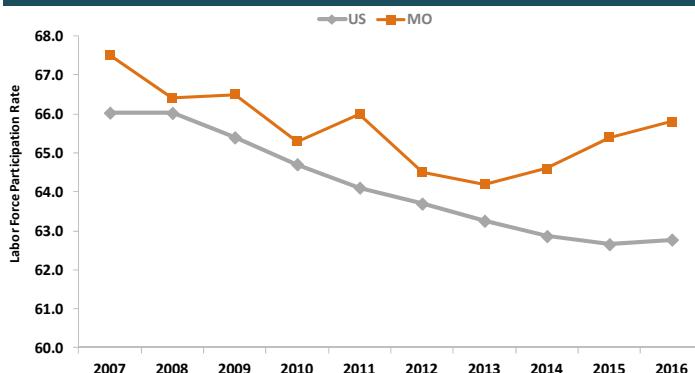
Source: U.S. Census Bureau, Current Population Survey; U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, 2016

Income growth, and by extension growth in the economy, is affected by labor force participation. The labor force participation rate (LFPR) is the ratio of the civilian labor force to the population. The national LFPR climbed to a peak of 67 percent by 1990 where it seemed to stabilize. However, since 2001 the LFPR has been falling. In the last ten years, the LFPR has averaged 64.2 percent. In 2015, the LFPR was at 62.7 percent. Compared to the nation, more Missourians—as a share of the state’s working age

population— participate in the labor force. While the state's LFPR has also shown a downward trend—from 66 in 2007 to 64.2 in 2013— it has been picking up since 2014 to reach 65.8 in 2016. Among Missouri's neighboring states, three of them scored higher: Iowa and Nebraska's participation rate was about 70 percent each and Kansas had a participation rate of 67.1 percent.

Missouri has consistently outperformed the nation in civilian labor force participation rates. Starting in 2013 the participation rates for Missouri began to climb diverge from the nation's rates, outperforming the US by 0.9 percent in 2013, 1.7 percent in 2014, 2.7 percent in 2015, then up to a 3.0 percent difference in 2016.

### Civilian Labor Force Participation Rates



Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics

**U**nemployment Rate measures the number of persons out of work but actively seeking employment relative to the civilian labor force.

As of June 2017, the nation's unemployment rate, based on a three-month moving average, was 4.5 percent. Missouri's unemployment rate was 3.8 percent, representing 117,518 Missourians out of work. This is quite significant as this is the first time in over a decade that the state's unemployment rate fell below 4 percent.

The economy continues to expand for both the nation and Missouri. From 2011 to 2015 Missouri lagged behind

### Unemployment Rate



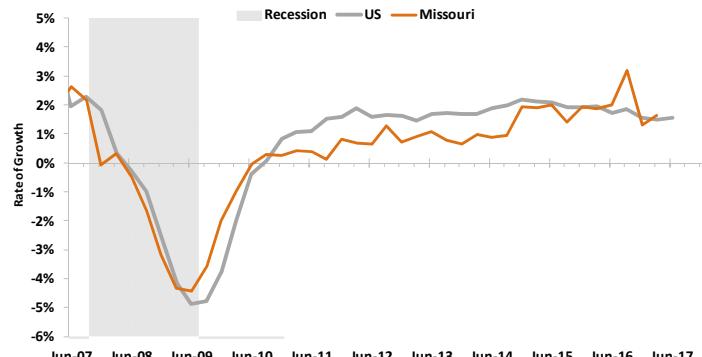
Note: Seasonally Adjusted 3-month moving average

Source: U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics.

the nation's economic growth anywhere between 0.3 to 2.2 percent. In 2016, Missouri caught up to the nation trailing by only .06 percent growth difference. Due to lower unemployment rates, the increase in labor force participation rates and a slow, but steady, economic growth period, Missouri is experiencing a tightening of the labor market.

**N**onfarm Payroll Employment increased 1.9 percent nationally, between June 2015 and June 2016, and dropped slightly to 1.6 percent growth from June 2016 to June 2017. Statewide, Missouri added 46,600 jobs from June 2016 to June 2017.

### Payroll Employment Annual Growth Rate



Note: Year-over-Year, quarterly data

Source: U.S. Bureau of Labor Statistics, CES

The U.S. continues with a slow recovery. From 2011-Q1 through 2017-Q2, the nation added 14.5 million jobs to the economy. The number of jobs added to the economy increased an average of 1.7 percent on an annual basis.

Missouri has followed the national pattern, although the state has generally moved at a slower rate than the nation. Since 2011Q2, Missouri has added over 219,800 jobs to the state's economy, an increase of 1.2 percent average annual growth.

**E**mployment change by industry identifies the types of jobs being created in the state. Industries with increasing employment indicate those jobs are becoming more present in Missouri. There may also be industries that behave more cyclically, growing during expansion and decreasing in times of economic slowdown or contraction.

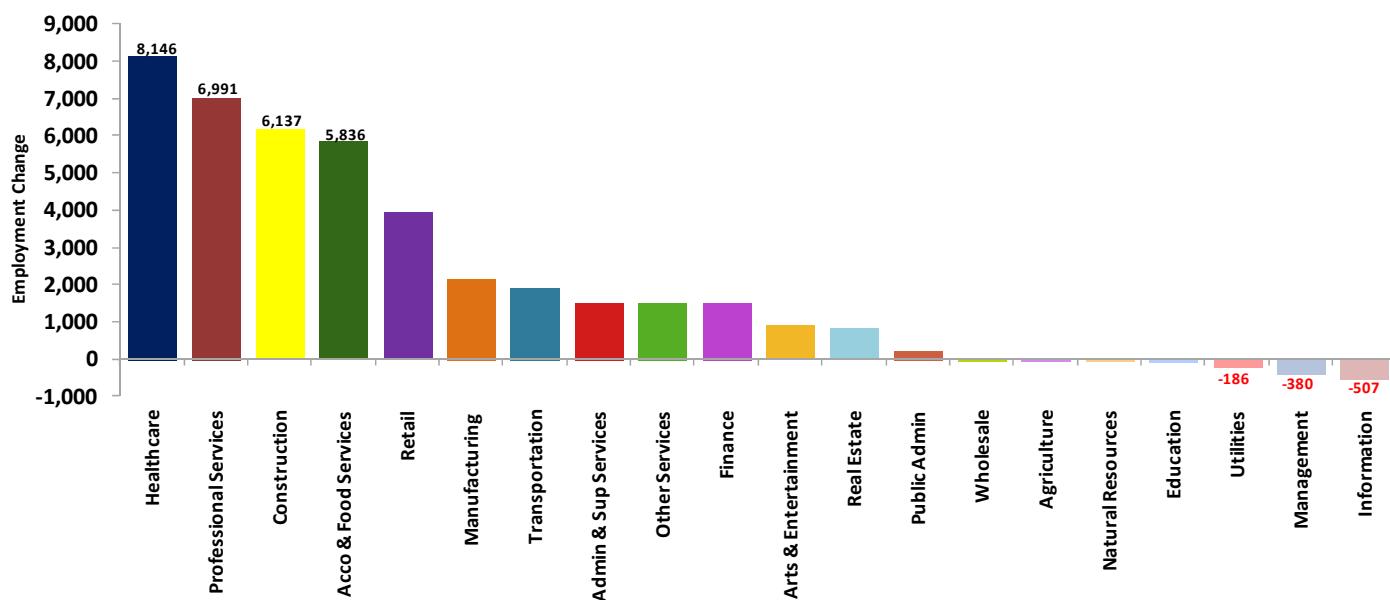
These changes are crucial; they help identify the types of jobs being lost by individuals and those industries that are

hiring. Tracking employment change throughout the year offers a snapshot in time of employment gains and losses, and tracks which industries are affected by these changes.

Excluding *Public Administration* and *Other Services*, eleven out of eighteen 2-digit NAICS industries added jobs between 2015 and 2016 on a seasonally adjusted basis. The largest increases for Missouri industries were in *Healthcare* which gained 8,146 workers; *Professional Services* which added 6,991; and *Construction* which added 6,137. *Accommodation & Food Services* was close behind at 5,836 workers.

The largest industry losses were in the *Information* sector which lost 507 jobs followed by *Management* which lost 380, and *Utilities* which lost 186 jobs. With most of the sectors showing employment increases, it bodes well for Missouri's continued economic growth.

### Missouri Employment Change by Industry Sector 2015 to 2016



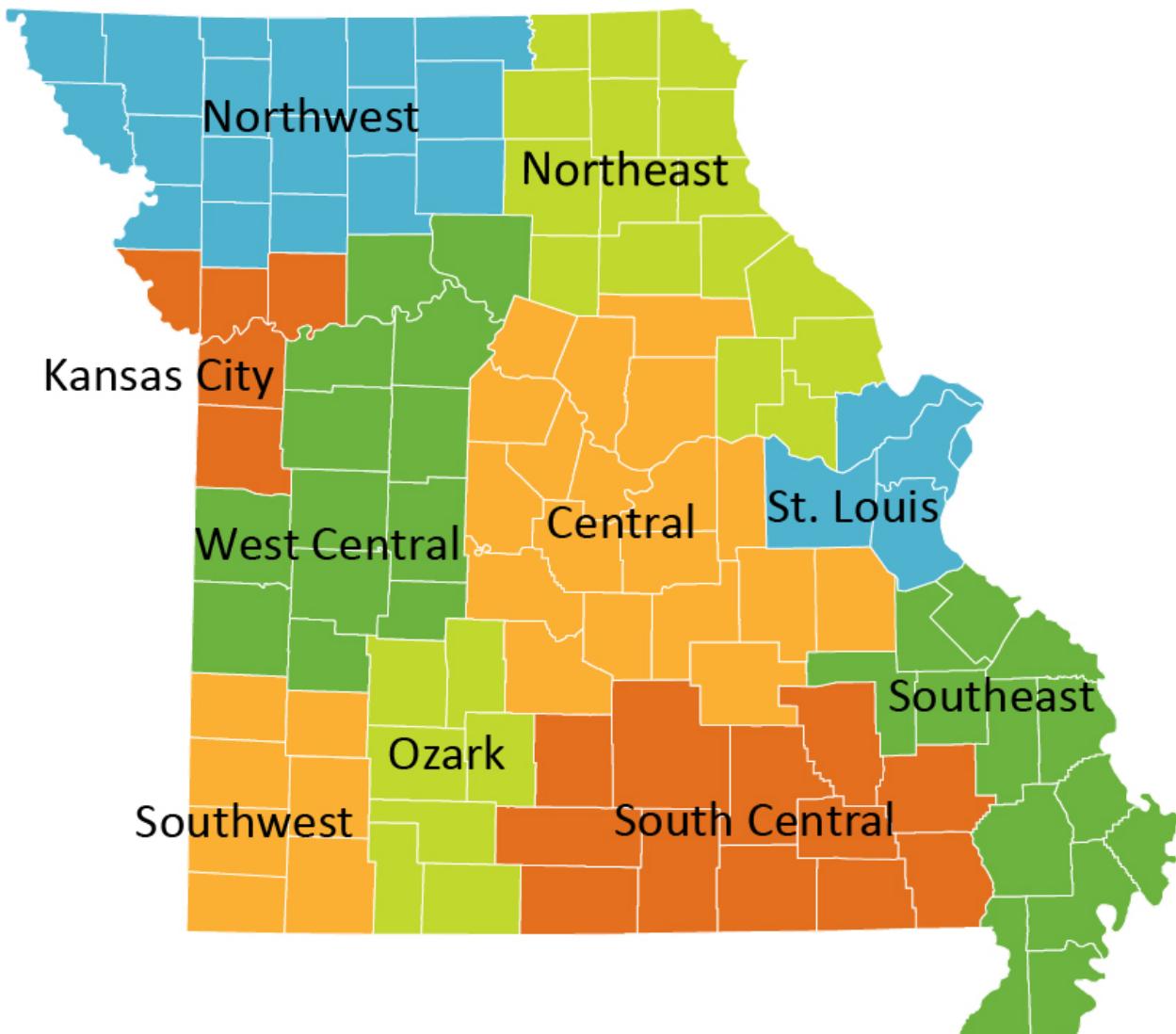
Source: MERIC analysis of the Quarterly Census of Employment and Wages micro-data, 2015 to 2016, Quarter 3



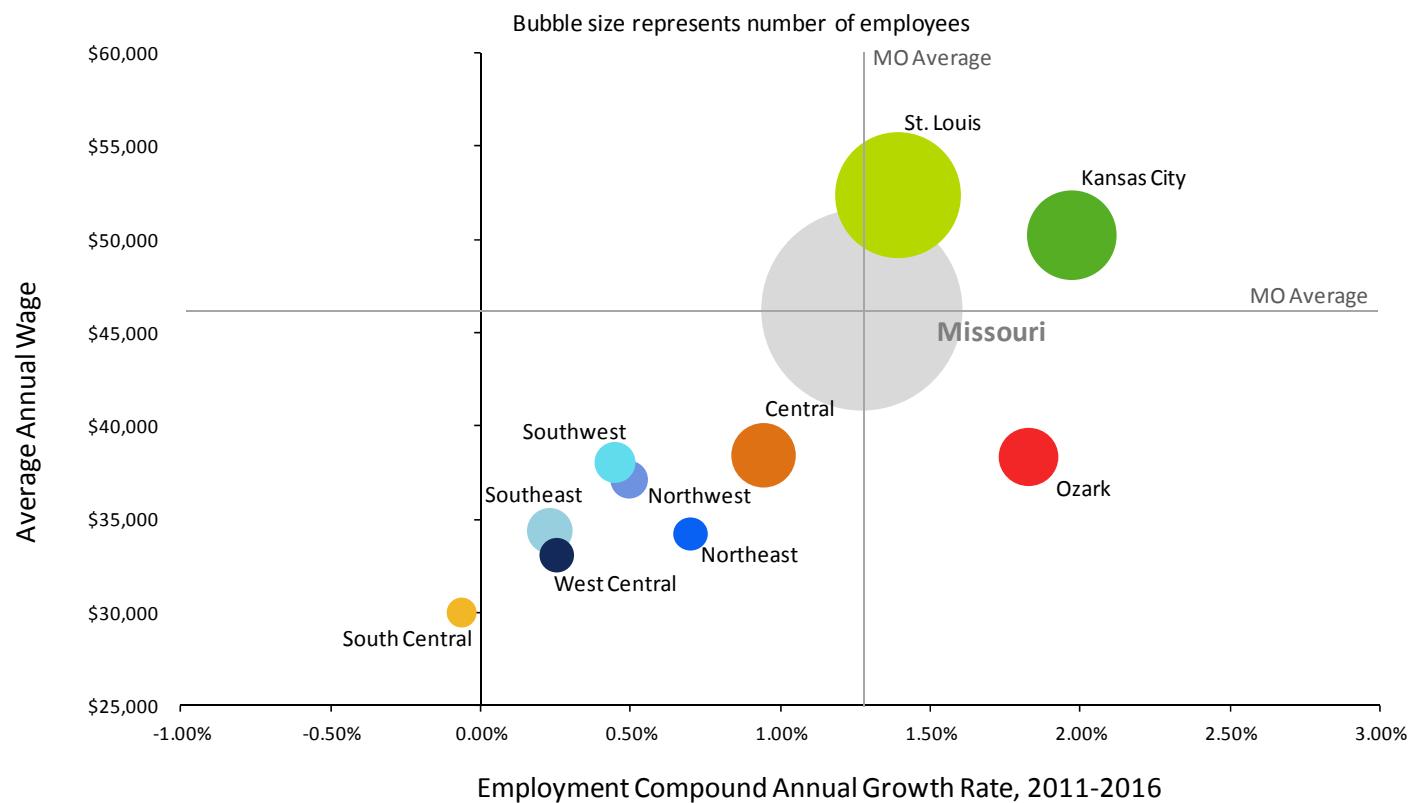
# Regional Analysis

Missouri's economy is diverse and varies by geography, natural resources and population. To better understand the state's economy, the following section analyses the various regional economies. The state is divided into ten regions, as shown in the map below. These regions were developed using the Workforce Development

Areas created by the Workforce Investment Act of 1998 and continued with the Workforce Innovation and Opportunity Act of 2014. For a list of the economic regions used in this analysis and the counties that make up those regions, see *Appendix A*.



## Missouri Regional Economic Profiles, 2016



Source: MERIC, Quarterly Census of Employment and Wages, 3<sup>rd</sup> Quarter

The Missouri Regional Economic Profiles graph helps explain the size, employment growth and wages for the various regional economies. The graph shows that the larger the size of the economy, the higher the average wages.

Kansas City has been the fastest growing economy from 2011 to 2016. From 2015 to 2016, the regional employment grew 2.8 percent. The Ozark Region has also had strong employment growth relative to the rest of Missouri, with employment gains of more than 2.0 percent in three of the past five years. The Saint Louis region has outpaced Missouri's average employment growth in each of the past four years.

Smaller, more rural regions, have seen lower levels of employment growth. The six smallest regions, in terms of total employment, represent the six lowest levels of

employment growth from 2011 to 2016. The South Central, Southeast, West Central and Southwest Regions all averaged less than 0.5 percent growth in employment from 2011 to 2015. From 2015 to 2016, the Southeast, West Central and Southwest Regions had negative employment growth.

From 2011 to 2016, the Northeast and Northwest regions averaged 0.7 and 0.5 percent growth per year, respectively. More recently in the Northeast Region employment growth has exceeded one percent in three of the past four years.



# Central Region

The Central Region is comprised of 19 counties in the center of Missouri. This region is home to several major cities including Columbia, Mexico, Rolla, Camdenton, Lebanon and the state capitol, Jefferson City.

Many of Missouri's major highways cross through this region. Interstate 44 runs through the southern part of the Region, while Interstate 70 crosses the northern part. In addition, Highway 50, Highway 54 and Highway 63 cross through the region.

## WORKFORCE DEMOGRAPHICS

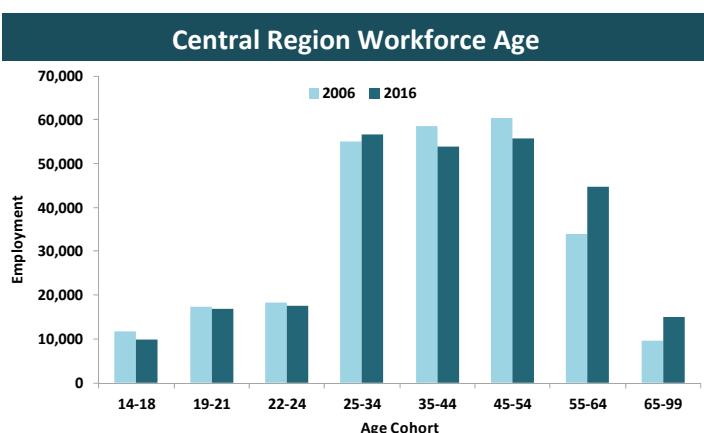
The Central Region workforce has over 276,000 employees, making up 10 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3<sup>rd</sup> quarter of 2016.

The workforce is getting older in the Central Region, a trend happening throughout Missouri. In 2016, 22 percent of the workforce was age 55 or older, up from 16 percent a decade earlier.



In 2016, 51 percent of the workforce was female and 49 percent was male, which compares to a 50/50 split for female and male workers in Missouri. For the region, 10 percent of the workforce was non-white, compared to 15 for the state; 3 percent of the Region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

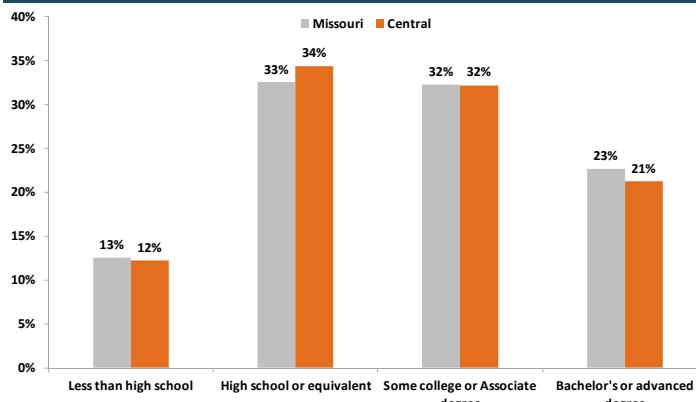
The primary language spoken at home is something other than English for 6 percent of the population age 18 to 64 in the Central Region, compared to 7 percent for Missouri and 21 percent for the US. The Central Region has a higher percentage of the population with a disability compared to the state and nation. For the Central Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. These two groups may face barriers to employment, and as a result, may fill lower skilled and lower wage jobs.



Source: US Census Bureau, LEHD, 3rd Quarter 2016

Educational attainment rates for the Central Region workforce are slightly behind those of the state in regards to bachelor's or advanced degrees. Twenty-one percent of the region's workforce has a bachelor's or advanced degree compared to 23 percent for the state.

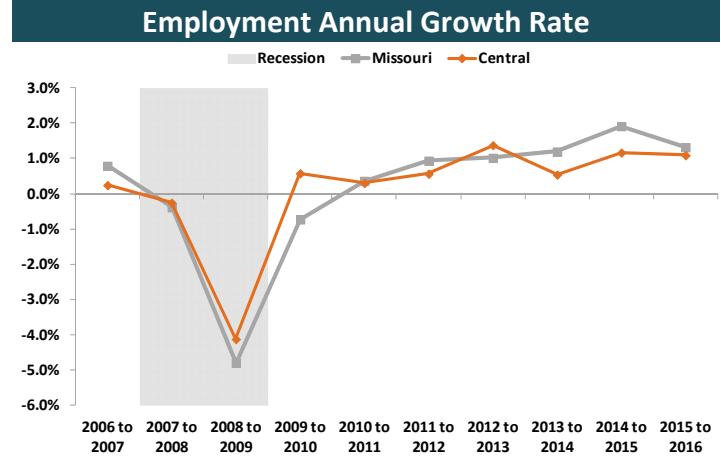
### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### INDUSTRY ANALYSIS

In 2016, employment in the Central Region was over 276,000. Employment in the region grew 1.1 percent from 2015 to 2016, adding nearly 3,000 jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the Central Region averaged 0.9 percent growth in employment, compared to 1.3 percent for the state.



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

Accommodation and Food Services led the way in job growth for the region, adding over 1,000 new jobs from 2015 to 2016. Manufacturing added over 700 jobs in 2016. Nearly 200 jobs were added in Transportation Equipment Manufacturing, 140 were added in Machinery Manufacturing and 116 were added in Fabricated Metal Production. Health Care and Social Assistance added over 700 new jobs in the Central Region in 2016

Industries experiencing job decline from 2015 to 2016 in the Central Region include Administrative & Support Services, down 400 jobs; Educational Services, down 280 jobs; and Public Administration, down 100 jobs.

Table 1: Central Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	41,474	45,394	3,920	1.8%	\$41,888
Retail Trade	35,122	37,073	1,951	1.1%	\$25,111
Accommodation & Food Services	27,040	29,131	2,091	1.5%	\$16,333
Public Administration	30,485	29,087	(1,399)	-0.9%	\$43,300
Educational Services	26,292	25,964	(328)	-0.3%	\$47,077
Manufacturing	23,372	24,904	1,533	1.3%	\$43,564
Construction	12,293	12,717	424	0.7%	\$44,697
Admin & Support Services	8,043	9,920	1,877	4.3%	\$27,080
Finance & Insurance	9,210	9,327	117	0.3%	\$59,636
Professional, Scientific, & Technical Services	7,411	8,253	841	2.2%	\$57,580

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

## Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average.

The Central Region has high concentrations in advanced manufacturing, including *Electrical Equipment Manufacturing* and *Wood Product Manufacturing*. Other concentrated industries include *Nonstore Retailers* and *Printing and Related Support Activities*.

**Table 2: Central Region Location Quotients**

Industry	Employment	Location Quotient
Electrical Equip., Appliance, & Component Mfg.	2,461	3.9
Nonstore Retailers	2,452	2.7
Wood Product Mfg.	1,780	2.7
Printing & Related Support Activities	1,984	2.7
Gasoline Stations	4,002	2.6
Utilities	1,864	2.0
Building Material & Garden Equip. Dealers	3,500	1.6
Motor Vehicle & Parts Dealers	5,249	1.6
Nonmetallic Mineral Product Mfg.	1,087	1.6
Plastics & Rubber Products Mfg.	1,832	1.6
Nursing & Residential Care Facilities	8,375	1.5
Machinery Mfg.	2,661	1.5
General Merchandise Stores	7,886	1.5

Source: MERIC, QCEW 3<sup>rd</sup> Quarter 2016

## Largest Employers in Central Region

Some of the largest employers in the area are health care providers including: **Boone Hospital**, **Phelps County Regional Medical Center**, **Capitol Region Medical Center** and the **Fulton State Hospital**.

There is a substantial presence in the financial/professional services industry with **State Farm Insurance**, **Veterans United Home Loans** and **Shelter Insurance** located in the region.

The Region is home to a large number of public sector employers as the Central Region has multiple state universities, including the **University of Missouri, Columbia**, the State Capitol in Jefferson City, and the US Army base **Fort Leonard. Wood**.

## Labor Supply and Demand

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Central Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows that *Health Care* and *Business & Sales* related jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage of workers seeking opportunities in these industry sectors. There may be an oversupply of labor in the areas of *Construction & Maintenance*, *Production* and *Management & Support* related fields, especially for lower skilled labor.

**Table 3: Real Time Labor Market Analysis, Central Region 2016**

	Total	Health Care & Related	Business & Sales	Science & Technology	Transportation	Other Services	Food Service	*CIMR	Production	Management & Support
<b>Number of Job Ads</b>	<b>32,038</b>	8,817	5,797	2,504	3,098	2,059	1,532	1,913	854	5,464
<b>% of Job Ads</b>	<b>100%</b>	27.5%	18.1%	7.8%	9.7%	6.4%	4.8%	6.0%	2.7%	17.1%
<b>Number of Jobseekers</b>	<b>11,272</b>	1,221	1,086	362	783	765	867	1,687	1,392	3,109
<b>% of Jobs Sought</b>	<b>100%</b>	10.8%	9.6%	3.2%	6.9%	6.8%	7.7%	15.0%	12.3%	27.6%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

## Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates degree or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers, Retail Salespersons* and *Food Service Workers* lead the way in total openings. Health care related positions, including *Home Health Aides, Veterinary Assistants* and *Personal Care Aids* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Supervisors for Retail, Maintenance & Repair Workers* and *Food Industry Workers* will have the most openings for the **Next** category of occupations. *Web Developers, Paralegals, and Preschool Teachers* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses, General & Operations Managers*, and *K12 Teachers* will have the most openings. *Interpreters, Statisticians* and *Software Developers* are the fastest growing **Later** occupations.

**Table 4: Central Region Long-Term Occupational Projections**

Occupation	2014	2024			Total Openings	Median Wages
	Estimated Employment	Projected Employment	Growth Openings	Replacement Openings		
<b>NOW</b>						
Cashiers	8,135	8,747	612	3,461	<b>4,073</b>	\$18,595 🔥
Retail Salespersons	9,755	10,387	632	3,381	<b>4,013</b>	\$19,914 🔥
Food Prep & Serving Workers	6,703	7,687	984	2,166	<b>3,150</b>	\$18,123 🔥
Waiters & Waitresses	5,735	6,035	300	2,759	<b>3,059</b>	\$18,144
Office Clerks	7,176	7,406	230	1,547	<b>1,777</b>	\$27,331 🔥
<b>NEXT</b>						
Nursing Assistants	4,870	5,369	499	1,100	<b>1,599</b>	\$23,041 🔥
Retail Sales Supervisor	3,816	4,104	288	853	<b>1,141</b>	\$34,100 🔥
Maintenance & Repair Workers	3,271	3,501	230	857	<b>1,087</b>	\$30,834 🔥
Cooks, Restaurant	2,111	2,478	367	559	<b>926</b>	\$19,578 🔥
Food Prep & Serving Supervisors	2,105	2,380	275	625	<b>900</b>	\$24,916 🔥
<b>LATER</b>						
Registered Nurses	6,229	6,858	629	1,470	<b>2,099</b>	\$54,395 🔥
General & Operations Managers	4,630	5,078	448	1,172	<b>1,620</b>	\$62,588
Secondary School Teachers	3,254	3,540	286	772	<b>1,058</b>	\$40,763
Elementary School Teachers	2,470	2,693	223	546	<b>769</b>	\$43,890
Accountants & Auditors	1,864	2,062	198	497	<b>695</b>	\$50,000

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

**Table 5: Central Region  
Fastest Growing Occupations**

**NOW**

Home Health Aides  
Veterinary Assistants  
Personal Care Aides  
Order Clerks  
Pharmacy Technicians

**NEXT**

Web Developers  
Paralegals & Legal Assistants  
Preschool Teachers  
Industrial Machinery Mechanics  
Cooks, Restaurant

**LATER**

Interpreters & Translators  
Statisticians  
Software Developers, Applications  
Health Specialties Teachers, Postsecondary  
Nurse Practitioners

Note: Occupations with net increase of less than 50 are omitted.

Source: MERIC Occupational Projections, 2014-2024



# Kansas City Region

The Kansas City Region is comprised of five counties in the West Central part of Missouri. The region is home to several major cities including Kansas City and Independence.

Many of Missouri's major highways cross through this region. Interstate 70 runs through the center of the region, while Interstate 29 and Interstate 35 and 435 cross through the region. In addition, Highway 24, Highway 40, Highway 50, Highway 69, Highway 71 and Highway 169 cross through the Region.

## WORKFORCE DEMOGRAPHICS

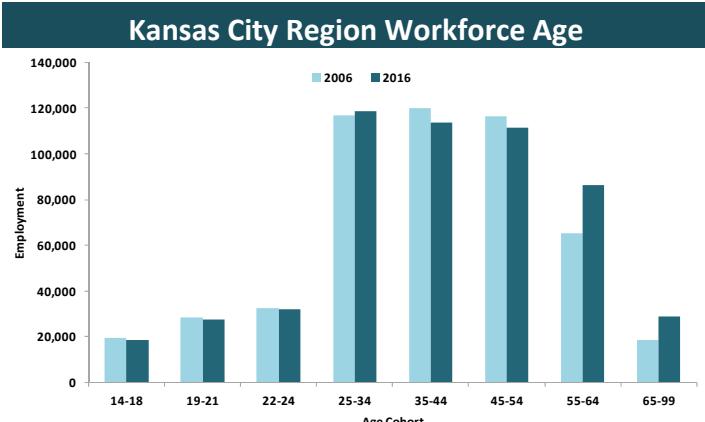
The Region is home to over 540,800 employees who make up 20 percent of Missouri's workforce. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment of Wages in the 3rd quarter of 2016.

The workforce in the Kansas City Region is getting older, a trend happening throughout Missouri. For the region in 2016, 21 percent of the workforce wage age 55 and older, up from 16 percent in 2006.



In 2016, 49 percent of the workforce was female and 51 percent was male, which compared to a 50/50 split for Missouri. For the Region, 18 percent was non-white, compared to 15 for the state; 6 percent was Hispanic or Latino, compared to 4 percent for Missouri.

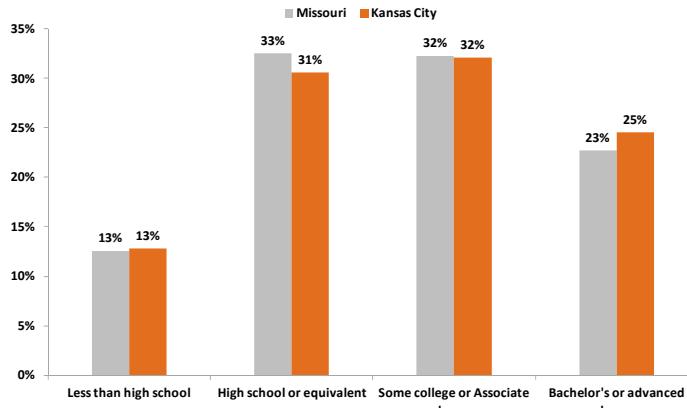
For the Kansas City Region, the primary language spoken at home is something other than English for 8 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 22 percent for the US. The Kansas City Region has a lower percentage of the population with a disability compared to the state. For the region, 11 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. Both of these groups may face barriers to employment, and as a result, may fill lower skilled and lower wage jobs.



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

Educational attainment rates for the Kansas City Region workforce is higher than that of Missouri in regards to post-secondary education. In the region, 25 percent of the workforce has a bachelor's or advanced degree, compared to 23 percent for the entire state of Missouri.

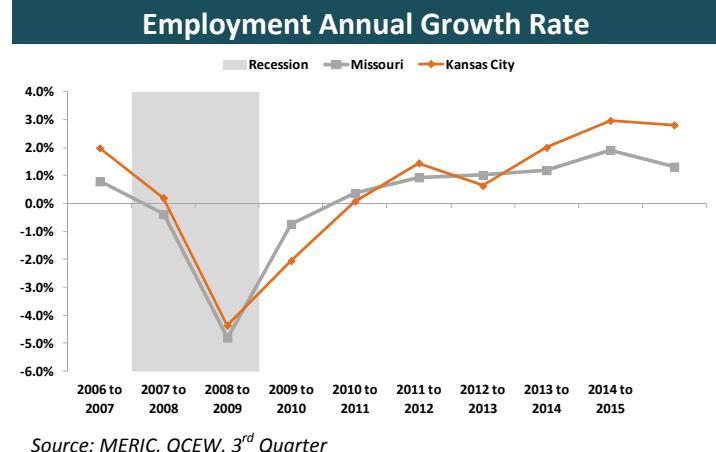
### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### INDUSTRY ANALYSIS

In 2016, employment in the Kansas City region was nearly 541,000. Employment grew 2.8 percent from 2015 to 2016, adding over 15,000 new jobs. The Kansas City Region led all Missouri regions in employment growth rate for the 3rd consecutive year. From 2011 to



2016, the region averaged 2.0 percent employment growth per year.

*Professional, Scientific & Technical Services* led the way for job growth in the region in 2016, adding over 3,300 jobs. The *Construction* and *Manufacturing* industries each added over 2,000 jobs, with over 1,000 jobs combined being added in *Motor Vehicle Parts* and *Motor Vehicle Manufacturing*.

From 2011 to 2016 *Professional, Scientific & Technical Services* has averaged 6 percent growth. Most of which came from 2014 to 2016. *Construction* averaged 5 percent annual growth from 2011 to 2016, with growth at

Table 1: Kansas City Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	71,258	80,462	9,205	2%	\$51,164
Retail Trade	56,092	58,908	2,817	1%	\$28,776
Accommodation & Food Services	47,451	54,154	6,703	3%	\$19,184
Professional, Scientific, & Technical Services	34,859	45,712	10,853	6%	\$82,746
Manufacturing	37,151	44,216	7,066	4%	\$58,717
Educational Services	33,148	34,133	985	1%	\$37,866
Admin & Support Services	24,951	29,784	4,832	4%	\$33,286
Finance & Insurance	27,365	28,084	719	1%	\$75,156
Construction	21,510	27,617	6,107	5%	\$61,373
Public Administration	26,500	26,611	111	0%	\$63,413

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

or above 5 percent the past two years. *Manufacturing* employment growth has been at or above 5 percent for the past three years.

The *Information* industry had employment decline in each of the past five years, losing over 3,700 jobs in the region from 2011 to 2016.

### **Location Quotient**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Kansas City Region has high concentrations in *Data Processing, Transportation Equipment Manufacturing* and *Support Activities for Transportation*—which includes *Support Activities for Air and Rail Transportation* and *Freight Transportation Arrangement*.

**Table 2: Kansas City Region Location Quotients**

Industry	Employment	Location Quotient
Data Processing & Hosting	2,937	2.6
Transportation Equip. Mfg.	12,807	2.1
Performing Arts & Spectator Sports	3,173	1.7
Support Activities for Transportation	3,950	1.6
Securities & Commodity Contracts	5,017	1.4
Prof., Scientific, and Tech. Services	45,159	1.3
Insurance Carriers	11,507	1.3
Mgmt. of Companies & Enterprises	10,837	1.3

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## **LABOR MARKET ANALYSIS**

### **Unemployment**

The unemployment rate was 3.9 percent in June 2017, down from 4.8 percent in June 2016. This mirrors a larger trend within the state and nation, showing a tightening of the labor market over the past year. From June 2012 to June 2017, the unemployment rate has dropped 3.4 percentage points.

### **Largest Employers in Kansas City Region**

The largest employers in the Kansas City Region come from a variety of industry sectors. Top health care employers include **Children's Mercy Hospital, St. Luke's Hospital, North Kansas City Hospital, Truman Medical Center** and **The Research Medical Center**.

Technology Companies such as **Cerner, Alliant Tech Systems** and **DST System** and manufactures such as **Ford** and **Honeywell** are located in the Region; as is the engineering firm **Burns & McDonnell Engineering**. **Hallmark**, with its corporate headquarters in Kansas City, is also a major employer.

The **University of Missouri, Kansas City** is a major public sector employer in the region.

### **Labor Supply and Demand**

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Kansas City Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real-Time Labor Market Analysis (*Table 3*) shows *Health Care* and *Business & Sales* related jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage of workers seeking opportunities in these industry sectors. There may also be an over-supply of labor in the areas of *Construction & Maintenance, Management & Support* and *Production* related jobs, especially for lower skilled labor.

**Table 3: Real Time Labor Market Analysis, Kansas City Region 2016**

	Total	Health Care & Related	Business & Sales	Science & Technology	Other Services	Transportation	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	94,686	19,541	17,767	11,356	5,589	8,587	3,683	5,628	19,790	2,745
% of Job Ads	100%	20.6%	18.8%	12.0%	5.9%	9.1%	3.9%	5.9%	20.9%	2.9%
Number of Jobseekers	16,986	1,703	1,584	594	982	1,570	1,109	2,394	5,024	2,026
% of Jobs Sought	100%	10.0%	9.3%	3.5%	5.8%	9.2%	6.5%	14.1%	29.6%	11.9%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, *jobs.mo.gov*

### **Occupational Projections**

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, front line service positions lead the way in total openings, including: *Food Service Workers*, *Retail Sales Persons*, *Waiters & Waitresses* and *Cashiers*. *Home Health Aides*, *Veterinary Assistants* and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

**Table 4: Kansas City Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median
	Employment	Employment	Openings	Openings	Openings	Wages
<b>NOW</b>						
Food Prep. & Serving Workers	15,568	17,167	1,599	5,031	6,630	\$18,248
Retail Salespersons	15,194	15,692	498	5,266	5,764	\$20,632
Waiters & Waitresses	11,460	11,684	224	5,514	5,738	\$18,875
Cashiers	12,844	13,095	251	5,465	5,716	\$19,236
Customer Service Representatives	10,431	11,483	1,052	2,569	3,621	\$31,967
<b>NEXT</b>						
Nursing Assistants	6,993	7,620	627	1,580	2,207	\$24,810
Cooks, Restaurant	5,015	5,687	672	1,327	1,999	\$22,113
Maintenance & Repair Workers	4,990	5,288	298	1,308	1,606	\$33,736
Food Prep. & Serving Supervisors	3,677	4,006	329	1,092	1,421	\$27,813
Retail Sales Supervisor	5,504	5,649	145	1,230	1,375	\$34,289
<b>LATER</b>						
Registered Nurses	12,212	13,760	1,548	2,881	4,429	\$63,786
General & Operations Managers	11,279	11,962	683	2,855	3,538	\$87,290
Accountants & Auditors	6,109	6,597	488	1,630	2,118	\$62,965
Software Developers, Applications	4,182	4,960	778	598	1,376	\$93,741
Elementary School Teachers	4,834	5,129	295	1,069	1,364	\$47,202

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

*Nursing Assistants, Cooks, Maintenance & Repair Workers, Food Service Supervisor and Retail Supervisors* will have the most openings for the **Next** category of occupations. *Millwrights, Phlebotomists, and Diagnostic Medical Sonographers* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses, General & Operations Managers, and Accountants* will have the most openings. *Operations Research Analysts, Interpreters* and medical professions such as *Nurse Practitioners and Physician Assistants* will be the fastest growing **Later** occupations.

**Table 5: Kansas City Region  
Fastest Growing Occupations**

**NOW**

Computer-Controlled Machine Tool Operators  
Structural Metal Fabricators & Fitters  
Home Health Aides  
Personal Care Aides  
Painters, Transportation Equipment

**NEXT**

Millwrights  
Phlebotomists  
Diagnostic Medical Sonographers  
Physical Therapist Assistants  
Industrial Machinery Mechanics

**LATER**

Operations Research Analysts  
Interpreters & Translators  
Nurse Practitioners  
Physician Assistants  
Information Security Analysts

Note: Occupations with net increase of less than 50 are omitted.

Source: MERIC Occupational Projections, 2014-2024



## Northeast Region

The Northeast Region consists of 16 counties in Northeastern Missouri. This region is home to several major cities including, Kirksville, Hannibal, Moberly and Warrenton.

Several of Missouri's major highways cross through this region. Interstate 70 crosses the southern part of the region. In addition, Highway 63 and Highway 61 run north/south and Highway 24, Highway 54, Highway 36 and Highway 136 run east/west.

### WORKFORCE DEMOGRAPHICS

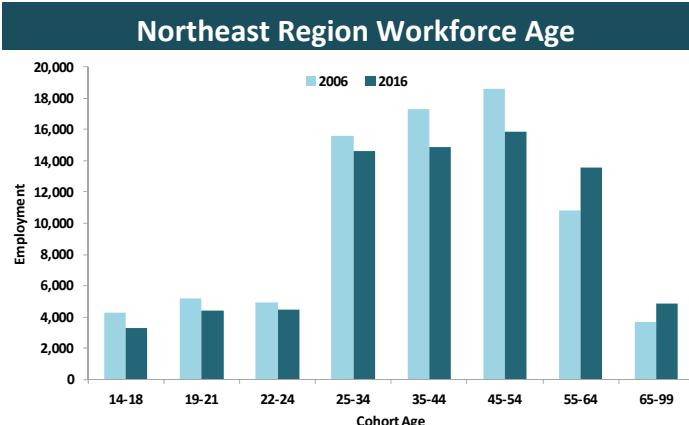
The Northeast Region is home to nearly 78,000 employees, making up 3 percent of Missouri's workforce. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

The workforce is getting older in the Northeast Region, a trend occurring throughout Missouri. In the Northeast Region in 2016, 24 percent of the workforce was age 55 and older, up from 18 percent a decade earlier.



In 2016, 51 percent of the workforce was female and 49 percent was male, which compares to a 50/50 split for female and male workers in Missouri. For the region, 7 percent was non-white, compared to 15 percent for the state; 2 percent of the region's workforce was Hispanic or Latino, compared to 4 percent for Missouri.

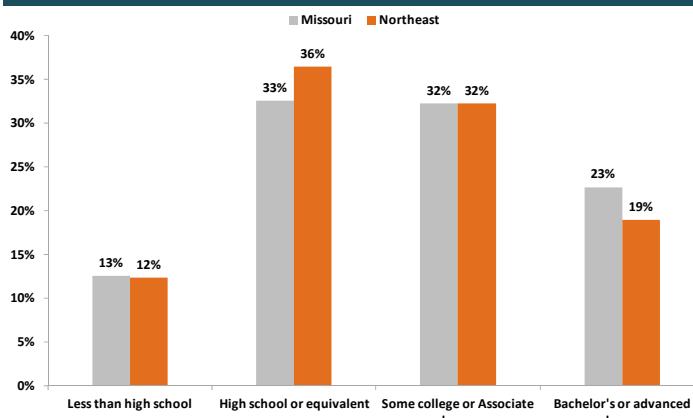
For the Northeast Region, the primary language spoken at home is something other than English for 4 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 21 percent for the US. The Northeast Region has a higher percentage of the population with a disability compared to the state and nation. For the Northeast Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

Educational attainment rates for the Northeast Region workforce are behind those of the state in regards to bachelor's or advanced degrees. Nineteen percent of the region's workforce have a bachelor's or advanced degree, compared to 23 percent for the state.

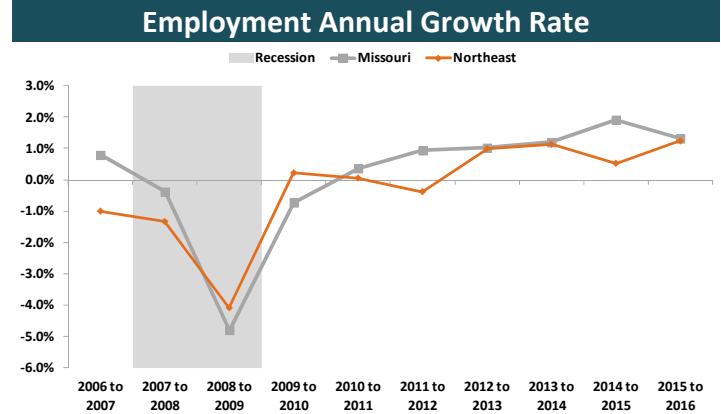
### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### INDUSTRY ANALYSIS

In 2016, employment in the Northeast Region was nearly 78,000. Employment grew 1.2 percent from 2015 to 2016, adding 950 new jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the Northeast Region averaged 0.7 percent growth, compared to 1.3 percent for the state.



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

*Manufacturing* lead the way in job growth in the region for 2016, adding over 480 jobs. *Health Care & Social Assistance* added over 280 jobs and *Construction* added over 200.

The job growth within these industries continues a trend in the region as *Manufacturing* and *Health Care & Social Assistance* have the largest job gains over the past five years, adding 1,060 jobs and 616 jobs respectively.

*Administrative & Support Services* saw a large decline in employment in the region, losing over 400 jobs, which represents a 22 percent loss of employment in that industry sector. *Wholesale Trade* lost over 100 jobs in 2016.

**Table 1: Northeast Region Top Industries by Employment**

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	12,290	12,906	616	1.0%	\$33,897
Retail Trade	10,797	11,303	506	0.9%	\$23,177
Manufacturing	9,549	10,609	1,060	2.1%	\$46,562
Educational Services	6,463	6,743	280	0.9%	\$34,183
Accommodation & Food Services	6,448	6,728	280	0.9%	\$13,165
Public administration	5,243	5,104	(139)	-0.5%	\$32,085
Construction	4,272	4,562	290	1.3%	\$47,978
Transportation & Warehousing	3,461	3,582	122	0.7%	\$40,811
Wholesale Trade	2,925	3,005	80	0.5%	\$46,917
Finance & Insurance	2,528	2,457	(70)	-0.6%	\$42,491

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

## Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Northeast Region has high concentrations in manufacturing including *Primary Metal Manufacturing*, *Food Manufacturing*, and *Machinery Manufacturing*.

**Table 2: Northeast Location Quotients**

Industry	Employment	Location Quotient
Primary Metal Mfg.	1,575	8.3
Gasoline Stations	1,969	4.1
Nonstore Retailers	1,064	3.9
Food Mfg.	2,160	2.7
Heavy and Civil Engineering Construction	1,084	2.1
Nursing and Residential Care Facilities	3,470	2.0
Machinery Mfg.	1,080	2.0
Truck Transportation	1,397	1.9
Building Material & Garden Equip. Dealers	1,215	1.8
General Merchandise Stores	2,575	1.6
Credit Intermediation	1,883	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## LABOR MARKET ANALYSIS

### Unemployment

The regional unemployment rate was 3.9 percent in June 2017, down from 5.0 percent a year earlier. This mirrors state and national trends, showing a tightening of the labor market. From June 2012 to June 2017, the unemployment rate dropped 3.4 percentage points.

### Labor Supply and Demand

Unemployment rates are dependent on the overall

### Largest Employers in Northeast Region

Top health care employers include **Hannibal Regional Hospital**, **Moberly Regional Medical Center** and the **Northeast Regional Medical Center**.

Top employing food manufacturers include **General Mills**, **Kraft Foods** and **Con Agra Foods**. **Cerro Flow** and **Bodine Aluminum** are major metal manufacturers. **Watlow Electric** is a major machinery manufacturer. **SC Data Center** is another major private employer in the region.

**Truman State University** is a large public sector employer in the region.

economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Northeast Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows *Health Care*, *Business & Sales* and *Transportation* jobs in high demand relative to other types of jobs in 2016. It also shows a shortage of workers seeking job opportunities in these industry sectors. There may be an oversupply of labor in the areas of *Construction & Maintenance*, *Management & Support* and *Production* related jobs, especially for lower skilled labor.

**Table 3: Real Time Labor Market Analysis, Northeast 2016**

	Total	Health Care & Related	Business & Sales	Transportation	Science & Technology	Other Services	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	9,090	2,647	1,389	1,158	415	572	380	546	1,644	339
% of Job Ads	100%	29.1%	15.3%	12.7%	4.6%	6.3%	4.2%	6.0%	18.1%	3.7%
Number of Jobseekers	4,362	462	404	346	126	301	252	654	1,194	622
% of Jobs Sought	100%	10.6%	9.3%	7.9%	2.9%	6.9%	5.8%	15.0%	27.4%	14.3%

Source: Burning Glass Technologies, Labor Insight ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers, Retail Salespersons* and *Food Service Workers* lead the way in total openings.

Health care related positions, including *Pharmacy Technicians and Personal Care Aides*, as well as manufacturing related positions, such as *Machine Feeders & Offbearers* and *Shipping & Receiving Clerks*, are projected to be the fastest growing **Now** occupations over the next decade.

*Truck Drivers, Nursing Assistants, and Maintenance & Repair Workers* will have the most openings among the **Next** category of occupations. *HVAC & Refrigeration Mechanics, Industrial Machinery Mechanics* and *Cooks* are the fastest growing **Next** occupations.

For **Later** occupations, *General & Operations Managers, Registered Nurses, and K12 Teachers* will have the most openings. The fastest growing occupations will be in the health care field and include *Physical Therapists, Substance Abuse and Behavioral Disorder Counselors* and *Nurse Practitioners*.

**Table 4: Northeast Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median
	Employment	Employment	Openings	Openings	Openings	Wage
<b>NOW</b>						
Cashiers	2,963	2,975	12	1,261	1,273	\$18,429
Retail Salespersons	2,122	2,211	89	736	825	\$21,788
Food Prep. & Serving Workers	1,845	2,052	207	596	803	\$18,248
Waiters & Waitresses	1,348	1,389	41	649	690	\$17,950
Laborers & Material Movers	1,369	1,479	110	407	517	\$23,030
<b>NEXT</b>						
Heavy & Tractor-Trailer Truck Drivers	1,727	1,869	142	294	436	\$38,468
Nursing Assistants	1,227	1,302	75	277	352	\$21,628
Maintenance & Repair Workers	1,020	1,065	45	267	312	\$30,913
Retail Sales Supervisors	840	874	34	188	222	\$33,155
Licensed Practical & Licensed Vocational Nurses	599	635	36	170	206	\$34,229
<b>LATER</b>						
General & Operations Managers	1,640	1,745	105	415	520	\$63,657
Registered Nurses	1,103	1,210	107	260	367	\$49,908
Secondary School Teachers	1,166	1,227	61	277	338	\$38,549
Elementary School Teachers	1,003	1,056	53	222	275	\$42,219
Substitute Teachers	874	928	54	165	219	\$22,222

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

## Table 5: Northeast Region Fastest Growing Occupations

### NOW

Pharmacy Technicians  
Machine Feeders & Offbearers  
Shipping, Receiving, & Traffic Clerks  
Personal Care Aides  
Loan Interviewers & Clerks

### NEXT

HVAC & Refrigeration Mechanics and Installers  
Industrial Machinery Mechanics  
Cooks, Restaurant  
Electricians  
Computer User Support Specialists

### LATER

Physical Therapists  
Substance Abuse & Behavioral Disorder Counselors  
Nurse Practitioners  
Loan Officers  
Educational, Guidance, & Vocational Counselors

Note: Occupations with net increase of less than 30 are omitted.

Source: *MERIC Occupational Projections, 2014-2024*

Source: *MERIC Occupational Projections*



## Northwest Region

The Northwest Region is made up of 18 counties in the Northwest corner of Missouri. The region is home to several major cities including, St. Joseph, Chillicothe, Trenton and Maryville.

Many of Missouri's major highways cross through this region. Interstate 29 runs through the western part of the region, while Interstate 35 crosses the middle. Highway 36 and Highway 136 run east/west. Highways 59, Highway 159, Highway 71, Highway 169, Highway 69 and Highway 65 run north/south.



### WORKFORCE DEMOGRAPHICS

The Northwest Region is home to nearly 94,000 employees, making up 3 percent of Missouri's workforce. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment of Wages in the 3rd quarter of 2016.

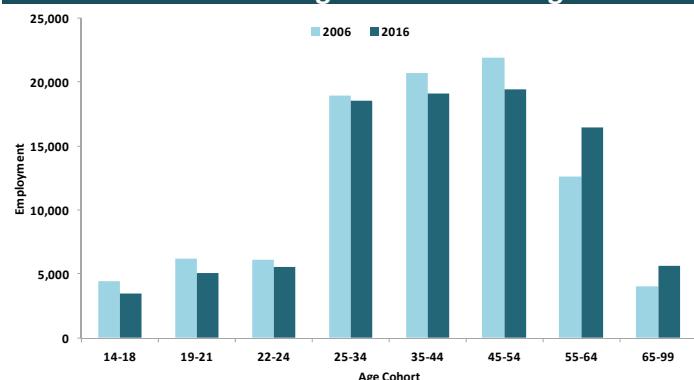
The workforce is getting older in the Northwest Region, a trend occurring throughout Missouri. In the region in 2016, 24 percent of the workforce was age 55 and older, up from 18 percent a decade earlier.

In 2016, 51 percent of the workforce was female and 49 percent was male, which compares to a 50/50 split for female and male workers in Missouri. For the Region, 7 percent of the workforce was non-white, compared to 15 percent for the state; 4 percent was Hispanic or Latino, which matches Missouri.

For the Northwest Region, the primary language spoken at home is something other than English for 5 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 21 percent for the US. The Northwest Region has 13 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. Both of these groups may face barriers to employment and, as a result, may fill lower skilled and lower wage jobs.

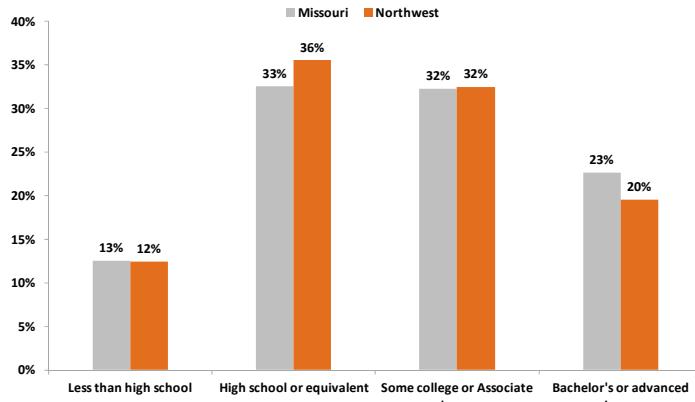
Educational attainment rates for the Northwest Region workforce are behind those of Missouri in regards to bachelor's or advanced degrees. Twenty percent of the region has a bachelor's or advanced degree, compared to 23 percent for the state.

#### Northwest Region Workforce Age



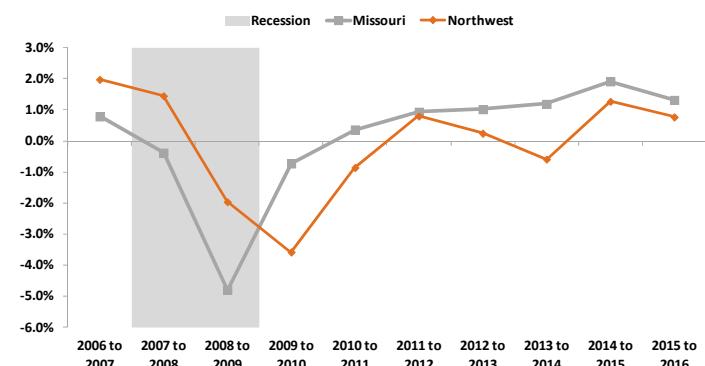
Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

## Employment Annual Growth Rate



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

## INDUSTRY ANALYSIS

In 2016, employment in the Northwest Region was nearly 94,000. Employment in the region grew 0.8 percent from 2015 to 2016, adding over 700 jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the Northwest Region averaged 0.5 percent employment growth per year, compared to 1.3 percent for the state.

*Manufacturing* and *Retail Trade* led the way for job growth in 2016, each adding over 300 jobs. *Accommodation and Food Services* added over 200 jobs in 2016.

Over a five year period (2011-2016), *Administrative and Support Services* was the leading industry in net job change for the region, with an annual growth rate of 6 percent. In 2016 as the industry lost over 200 jobs, after adding 830 the year before. *Manufacturing* was second in total job creation for the region from 2011 to 2016, adding 940 jobs. *Health Care & Social Assistance* added 893 jobs over that time period.

### Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

Table 1: Northwest Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Manufacturing	14,928	15,869	940	1%	\$53,369
Health Care & Social Assistance	14,599	15,492	893	1%	\$38,568
Retail Trade	12,196	12,508	312	1%	\$24,048
Accommodation & Food Services	7,118	7,192	74	0%	\$13,841
Educational Services	6,845	7,047	201	1%	\$31,555
Public Administration	6,879	6,493	(387)	-1%	\$34,301
Admin & Support Services	3,085	4,185	1,100	6%	\$29,185
Construction	3,965	4,018	53	0%	\$50,300
Wholesale Trade	3,280	3,331	51	0%	\$46,939
Finance & Insurance	3,246	3,186	(60)	0%	\$49,384

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

The Northwest Region has a high concentration in *Animal Production* and in manufacturing, including: *Food Manufacturing*, *Chemical Manufacturing*, *Fabricated Metal Product Manufacturing* and *Machinery Manufacturing*.

**Table 2: Northwest Region Location Quotients**

Industry	Employment	Location Quotient
Animal Production	1,295	7.9
Food Mfg.	6,177	6.3
Chemical Mfg.	1,702	3.3
Gasoline Stations	1,853	3.2
Fabricated Metal Product Mfg.	2,701	3.1
Machinery Mfg.	1,643	2.5
Nursing & Residential Care Facilities	3,998	1.9
Building Material & Garden Equip. Dealers	1,399	1.7
General Merchandise Stores	3,085	1.6
Merchant Wholesalers	1,790	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

### Largest Employers in Northwest Region

The Region's top employers are in health care and advanced manufacturing. The top health care employer is the **Heartland Regional Medical Center**.

**Boehringer Ingelheim** is a major employer in chemical manufacturing. Top employing food manufacturers include **Triumph Foods**, **Smithfield Farmland**, and **Hillshire Brands**. **Kawasaki Motors** is a major machinery manufacturer, and **Altec Industries** is a large fabricated metals manufacturer. **Murphy-Brown** is a large animal production employer in the region.

**Northwest Missouri State University** is a major public employer in the region.

## LABOR MARKET ANALYSIS

### Unemployment

The regional unemployment rate was 3.8 percent in June 2017, down from 4.7 percent a year earlier. This mirrors a state and national trends, showing a tightening of the labor market. From June 2012 to June 2017, the unemployment rate dropped 2.7 percentage points.

### Real-Time Labor Market Summary

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region,

job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Northwest Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows high demand for *Health Care*, *Business & Sales*, and *Transportation* related positions. The analysis also shows a shortage of workers seeking opportunities in these industry sectors. There may be an oversupply of labor in the areas of *Construction & Maintenance*, *Management & Support* and *Production* related occupations, especially for lower skilled labor.

**Table 3: Real Time Labor Market Analysis, Northwest 2016**

	Total	Health Care & Related	Business & Sales	Transportation	Science & Technology	Other Services	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	13,318	2,703	2,181	2,199	586	903	787	1,281	2,049	629
% of Job Ads	100%	20.3%	16.4%	16.5%	4.4%	6.8%	5.9%	9.6%	15.4%	4.7%
Number of Jobseekers	5,033	450	430	459	148	339	297	748	1,310	852
% of Jobs Sought	100%	8.9%	8.6%	9.1%	2.9%	6.7%	5.9%	14.9%	26.0%	16.9%

Source: Burning Glass Technologies, *Labor Insight*; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers, Food Service Workers* and *Retail Salespersons* lead the way in total openings. Health

care related positions such as, *Personal Care Aides, Home Health Aides* and *Medical Secretaries* as well as *Insurance Sales Agents* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Maintenance & Repair Workers, Supervisors for Retail and Licensed Practical & Vocational Nurses* will have the most openings for the **Next** category of occupations. *Preschool Teachers, Industrial Machinery Mechanics, Medical Assistants, Machinists, and Electricians* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses, K12 Teachers and General & Operations Managers* will have the most openings. *Substance Abuse & Behavioral Disorder Counselors, Loan Officers* and *Registered Nurses* are the fastest growing **Later** occupations.

**Table 4: Northwest Region Long-Term Occupational Projections**

Occupation	2014 Est. Employment	2024 Proj. Employment	Growth Openings	Replacement Openings	Total Openings	Median Wage
<b>NOW</b>						
Cashiers	2,989	3,057	68	1,272	1,340	\$18,472
Food Prep. & Serving Workers	2,927	3,159	232	946	1,178	\$18,111
Retail Salespersons	2,748	2,813	65	952	1,017	\$20,970
Waiters & Waitresses	1,402	1,387	0	675	675	\$18,316
Laborers & Material Movers	1,676	1,800	124	499	623	\$24,793
<b>NEXT</b>						
Nursing Assistants	2,154	2,280	126	487	613	\$20,555
Maintenance & Repair Workers	1,365	1,435	70	358	428	\$31,270
Retail Sales Supervisors	1,223	1,255	32	273	305	\$35,302
Licensed Practical & Licensed Vocational Nurses	891	938	47	254	301	\$35,455
Teacher Assistants	863	929	66	207	273	\$19,968
<b>LATER</b>						
Registered Nurses	1,946	2,169	223	459	682	\$56,887
Secondary School Teachers	2,044	2,174	130	485	615	\$41,402
General & Operations Managers	1,593	1,697	104	403	507	\$67,144
Middle School Teachers	951	1,014	63	210	273	\$40,292
Elementary School Teachers	714	762	48	158	206	\$43,081

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

**Table 5: Northwest Region  
Fastest Growing Occupations**

**NOW**

Personal Care Aides  
Home Health Aides  
Insurance Sales Agents  
Medical Secretaries  
Construction Laborers

**NEXT**

Preschool Teachers  
Industrial Machinery Mechanics  
Medical Assistants  
Machinists  
Electricians

**LATER**

Substance Abuse & Behavioral Disorder Counselors  
Loan Officers  
Registered Nurses  
Accountants & Auditors  
Substitute Teachers

Note: Occupations with net increase of less than 30 are omitted.

Source: *MERIC Occupational Projections, 2014-2024*



# Ozark Region

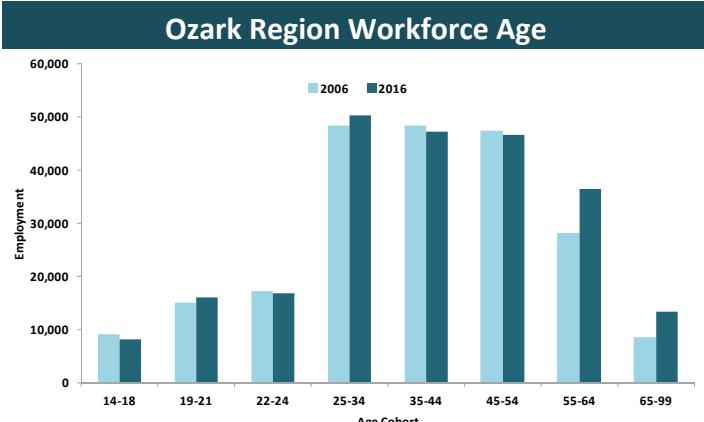
The Ozark Region is composed of seven counties in Southwest Missouri. This region is home to several major cities including Springfield and Branson.

Many of Missouri's major highways cross through this Region. Interstate 44 runs through the center of the Region. In addition, Highway 60 and Highway 160 cross east/west through the Region while Highway 65 runs north/south.

## WORKFORCE DEMOGRAPHICS

The Ozark Region workforce has over 231,000 employees, making up 8 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

The workforce is getting older in the Ozark Region, a trend occurring throughout Missouri. In the Ozark Region in 2016, 21 percent of the workforce was age 55 or older, up from 17 percent a decade earlier.



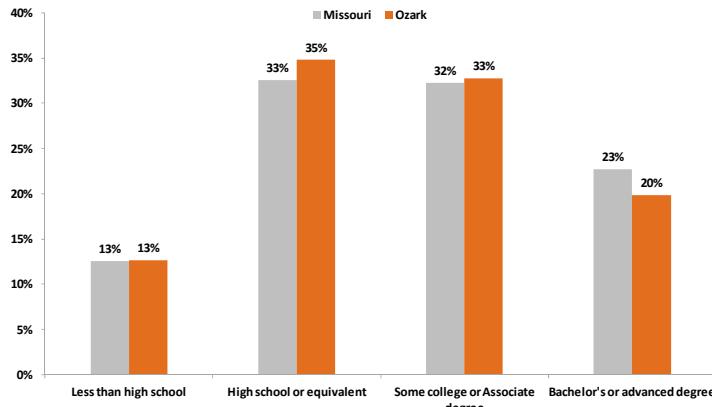
Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

In 2016, there was a 50/50 split between females and males in the Ozark Region workforce, which mirrors that of Missouri. For the region, 7 percent of the workforce was non-white, compared to 15 percent for the state; 3 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For the Ozark Region, the primary language spoken at home is something other than English for 5 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 22 percent for the US. In the region, 13 percent of the population, age 18 to 64, has a disability, which matches the Missouri rate. The US has 10 percent of the population with a disability. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Ozark region are below Missouri for workers with bachelor's or advanced degrees. Twenty percent of the region's workforce has a bachelor's or advanced degree compared to 23 percent for the state.

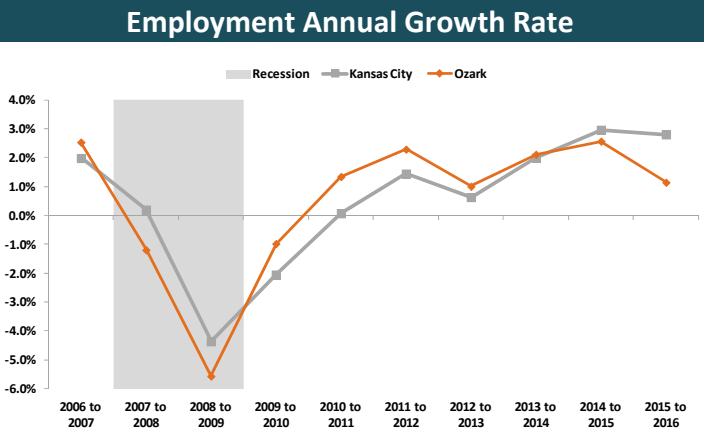
### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### INDUSTRY ANALYSIS

In 2016, employment in the Ozark Region was over 231,000. Employment in the region grew 1.1 percent from 2015 to 2016, adding over 2,600 jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the Ozark Region averaged 1.8 percent growth in employment, compared to 1.3 percent for the state.



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

Industries related to tourism were drivers of the employment growth in the Ozark Region in 2016. *Accommodation & Food Services* added 870 jobs, *Arts & Entertainment* added 530 and *Retail Trade* added 500.

*Professional, Scientific & Technical Services* added 600 jobs in 2016, continuing a trend of strong growth in the region over the past five years. From 2011 to 2016, The industry sector has averaged 9 percent growth per year, or about 620 jobs per year.

The *Information* sector lost over 760 jobs from 2015 to 2016, reversing a growth trend over the previous two years. *Finance & Insurance* lost 259 jobs, which is a continuation of trend over the previous four years.

Table 1: Ozark Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	36,582	39,382	2,801	1%	\$49,283
Retail Trade	29,691	31,596	1,905	1%	\$26,776
Accommodation & Food Services	26,415	29,974	3,558	3%	\$18,311
Manufacturing	14,336	15,354	1,018	1%	\$45,782
Educational Services	14,029	14,338	309	0%	\$35,532
Admin & Support & Waste Management	12,419	14,120	1,701	3%	\$31,907
Transportation & Warehousing	9,377	12,179	2,802	5%	\$48,329
Construction	9,467	10,851	1,383	3%	\$43,505
Wholesale Trade	9,642	10,662	1,020	2%	\$48,908
Professional, Scientific, & Technical Services	5,842	8,940	3,099	9%	\$51,785

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

### Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Ozark Region has high concentrations in *Truck Transportation* and in industries related to tourism, including *Performing Arts* and *Accommodation*. It also has high concentrations in *Sport, Hobby, Musical & Book Stores*.

**Table 2: Ozark Region Location Quotients**

Industry	Employment	Location Quotient
Truck Transportation	6,500	2.6
Performing Arts & Spectator Sports	2,153	2.6
Accommodation	7,466	2.2
Sport, Hobby, Musical, & Book Store	1,915	1.9
Hospitals	15,348	1.8
Nonstore Retailers	1,647	1.8
Gasoline Stations	2,412	1.5
Telecommunications	1,955	1.4
Misc. Store Retailers	2,019	1.4
General Merchandise Stores	7,468	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## LABOR MARKET ANALYSIS

### Unemployment

The regional unemployment rate was 3.6 percent in June 2017, down from 4.6 percent a year earlier. This mirrors state and national trends, showing a tightening of the labor market. From June 2012 to June 2017, the unemployment rate dropped 3.2 percentage points.

### Largest Employers in Ozark Region

Top Health Care employers include **Mercy Hospital Springfield**, **CoxHealth** and **Citizens Memorial Hospital**.

**New Prime, Inc.** is a major employer within truck transportation. **Kraft Foods** and **Loren Cook** are major manufacturers. There are call centers for **Chase Bank Cardservices**, **Hotels.com** and **T-Mobile**. **Bass Pro Shops** and **O'Reilly Automotive** have their corporate headquarters in the Region.

**Missouri State University** is a major public sector employer in the region.

### Real-Time Labor Market Summary

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Ozark Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows that *Business & Sales* and *Health Care* related jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage of workers in those industry sectors. There may be an oversupply of labor in *Construction & Maintenance*, *Production* and *Management & Support* related fields, especially for lower skilled labor.

**Table 3: Real Time Labor Market Analysis, Ozark 2016**

	Total	Business & Sales	Health Care & Related	Science & Technology	Transportation	Other Services	Food Service	*CIMR	Production	Management & Support
Number of Job Ads	29,152	6,116	5,062	2,077	3,018	1,864	1,879	2,096	880	6,160
% of Job Ads	100%	21.0%	17.4%	7.1%	10.4%	6.4%	6.4%	7.2%	3.0%	21.1%
Number of Jobseekers	13,668	1,531	1,175	391	1,097	913	1,064	1,964	1,416	4,117
% of Jobs Sought	100%	11.2%	8.6%	2.9%	8.0%	6.7%	7.8%	14.4%	10.4%	30.1%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Retail Salespersons, Food Service Workers, Waiters & Waitresses, and Cashiers* lead the

way in total openings. *Personal Care Aids, Home Health Aides and Pharmacy Technicians* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Truck Drivers and Maintenance & Repair Workers* will have the most openings for the **Next** category of occupations. Health Care related positions including *Physical Therapist Assistants, Cardiovascular Technologist & Technicians, Diagnostic Medical Sonographers*, among others, are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses and General & Operations Managers* will have the most openings. The Health Care field will also be the fastest growing **Later** occupations, with *Nurse Practitioners, Physical Therapists and Physician Assistants* showing high growth rates in the region.

**Table 4: Ozark Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median Wage
	Employment	Employment	Openings	Openings	Openings	
<b>NOW</b>						
Retail Salespersons	9,730	10,800	1,070	3,372	<b>4,442</b>	\$21,489 🔥
Combined Food Prep. & Serving Workers	7,412	9,265	1,853	2,395	<b>4,248</b>	\$18,626 🔥
Waiters & Waitresses	5,279	6,027	748	2,540	<b>3,288</b>	\$17,944
Cashiers	6,121	6,673	552	2,604	<b>3,156</b>	\$18,534 🔥
Customer Service Representatives	4,508	5,531	1,023	1,110	<b>2,133</b>	\$27,879 🔥
<b>NEXT</b>						
Nursing Assistants	4,015	5,016	1,001	907	<b>1,908</b>	\$22,288
Heavy & Tractor-Trailer Truck Drivers	6,034	6,495	461	1,026	<b>1,487</b>	\$41,667 🔥
Maintenance & Repair Workers	3,165	3,628	463	829	<b>1,292</b>	\$28,771 🔥
Cooks, Restaurant	2,104	2,657	553	557	<b>1,110</b>	\$19,703 🔥
Food Prep. & Serving Supervisors	1,950	2,384	434	579	<b>1,013</b>	\$28,347 🔥
<b>LATER</b>						
Registered Nurses	5,614	7,216	1,602	1,325	<b>2,927</b>	\$54,044 🔥
General & Operations Managers	4,187	4,764	577	1,060	<b>1,637</b>	\$66,637 🔥
Substitute Teachers	1,933	2,227	294	364	<b>658</b>	\$22,476
Accountants & Auditors	1,446	1,711	265	386	<b>651</b>	\$49,245 🔥
Secondary School Teachers	1,625	1,856	231	385	<b>616</b>	\$44,149

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

**Table 5: Ozark Region  
Fastest Growing Occupations**

**NOW**

Personal Care Aides  
Home Health Aides  
Pharmacy Technicians  
Food Prep & Serving Workers  
Social & Human Service Assistants

**NEXT**

Physical Therapist Assistants  
Cardiovascular Technologists & Technicians  
Diagnostic Medical Sonographers  
Phlebotomists  
Health Technologists & Technicians

**LATER**

Nurse Practitioners  
Physical Therapists  
Physician Assistants  
Appraisers & Assessors of Real Estate  
Occupational Therapists

Note: Occupations with net increase of less than 50 are omitted.

Source: *MERIC Occupational Projections, 2014-2024*



## South Central Region

The South Central Region consists of 12 counties in the center of the southern portion of Missouri. The region is home to several major cities including West Plains and Poplar Bluff.

Many of Missouri's major highways cross through this region. Highway 60 and Highway 160 run east/west through the region. Highway 63 and Highway 67 cross through the region north/south.

### WORKFORCE DEMOGRAPHICS

The South Central Region workforce has over nearly 58,900 employees, making up 2 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

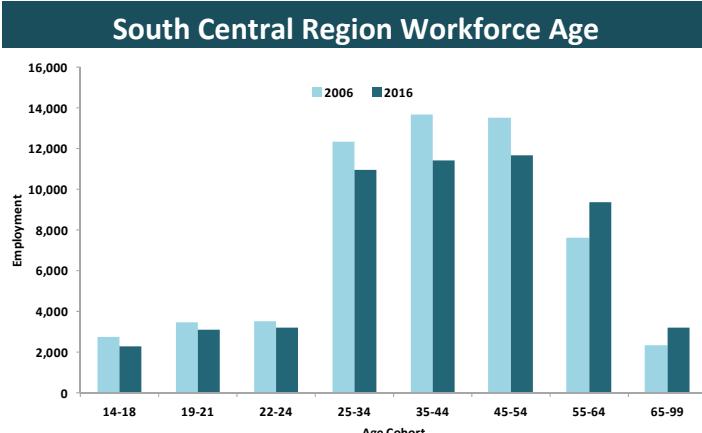
The workforce is getting older in the South Central Region, a trend occurring throughout Missouri. In the region in 2016, 21 percent of the workforce was age 55 and older, up from 17 percent a decade earlier.



in 2016, 54 percent of the workforce was female and 46 percent was male, which compares to a 50/50 split for female and male workers in Missouri. For the Region, 6 percent of the workforce was non-white, compared to 15 percent for the state; 2 percent was Hispanic or Latino, compared to 4 percent for Missouri.

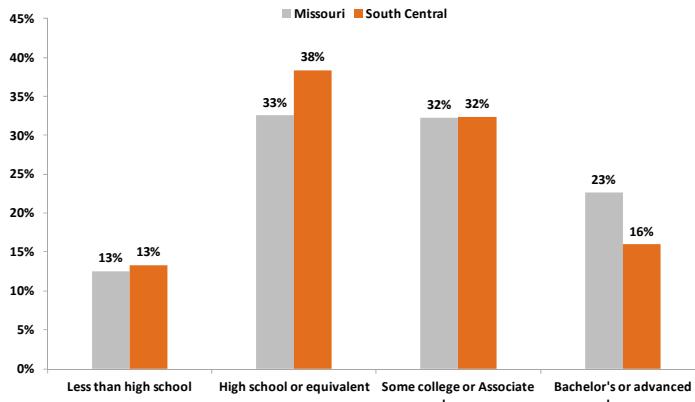
For the South Central Region, the primary language spoken at home is something other than English for 2 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 22 percent for the US. The South Central Region has a higher percentage of the population with a disability compared to the state and nation. For the South Central Region, 21 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the South Central Region workforce are behind those of the state in regards to bachelor's or advanced degrees. Sixteen percent of the region's workforce has a bachelor's or advanced degree compared to 23 percent of the state.

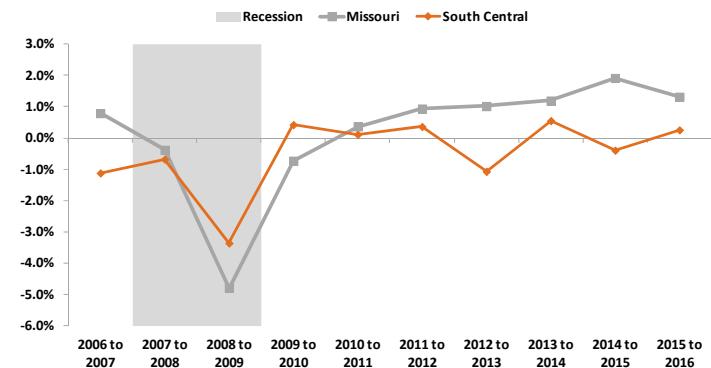


Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

## Educational Attainment



## Employment Annual Growth Rate



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

## INDUSTRY ANALYSIS

In 2016, employment in the South Central Region was nearly 58,900. Employment in the region grew 0.3 percent from 2015 to 2016, adding 150 jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the South Central Region averaged -0.1 percent growth in employment, compared to 1.3 percent for the state.

*Accommodation and Food Services* led the way in employment growth in the region adding 310 jobs from 2015 to 2016, which represents a 6 percent increase in employment in the industry. *Wholesale Trade* added over 100 jobs in 2016 and *Construction* added over 70,

representing a 6 percent increase in employment in each of the respective industries.

*Health Care* saw the largest employment growth from 2011 to 2016, adding 1,359 jobs, although a majority of those jobs (1,305) were added in 2013. In 2016, the *Health Care Industry* lost 42 jobs.

*Manufacturing* continues to be the cause of the low employment growth in the region. *Manufacturing* in the region has seen a decline in employment in each of the past five years (2011-2016) and in nine of the last 10. From 2011 to 2016, the region has lost 1,521 jobs in *Manufacturing* with over 1,000 of those jobs lost in *Machinery Manufacturing*.

Table 1: South Central Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	11,316	12,676	1,359	2%	\$31,463
Retail Trade	8,450	8,715	264	1%	\$22,236
Manufacturing	9,943	8,422	(1,521)	-3%	\$34,477
Accommodation & Food Services	4,887	5,338	451	2%	\$13,142
Educational Services	4,009	4,061	51	0%	\$29,258
Public administration	3,622	3,680	58	0%	\$33,222
Admin & Support Services	1,824	2,049	225	2%	\$19,099
Wholesale Trade	1,677	1,977	300	3%	\$39,017
Transportation & Warehousing	2,053	1,975	(78)	-1%	\$38,266
Construction	1,960	1,961	2	0%	\$37,113

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

### Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The South Central Region has high concentrations in advanced manufacturing, including, *Wood Product Manufacturing, Machinery Manufacturing, and Plastics & Rubber Manufacturing*.

**Table 2: South Central Region Location Quotients**

Industry	Employment	Location Quotient
Wood Product Mfg.	1,889	12.1
Machinery Mfg.	1,711	4.1
Gasoline Stations	1,290	3.5
Plastics & Rubber Products Mfg.	789	2.8
Social Assistance	3,341	2.4
Nursing & Residential Care Facilities	2,884	2.2
General Merchandise Stores	2,305	1.8
Bldg. Material & Garden Equip. Dealers	881	1.7
Truck Transportation	991	1.7
Motor Vehicle & Parts Dealers	1,136	1.4
Fabricated Metal Product Mfg.	789	1.4
Transportation Equip. Mfg.	898	1.4
Food and Beverage Stores	1,656	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

### LABOR MARKET ANALYSIS

#### Unemployment

The regional unemployment rate was 5.1 percent in June 2017, down from 6.7 percent a year earlier. The decline in the unemployment rate mirrors a trend happening throughout Missouri and the US. The South Central

#### Largest Employers in South Central Region

Top employers in the Region are in *Health Care and Manufacturing*. **Poplar Bluff Regional Medical Center**, the **Ozarks Medical Center** and the **Pershing VA Medical Center** are all large health care employers in the Region.

Major manufactures include **Briggs and Stratton, Scroll Compressors** and **Libia Industries**.

Region unemployment rate consistently is higher than that of the state and nation.

#### Labor Supply and Demand

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the South Central Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows that *Health Care* and *Business & Sales* related jobs were in high demand relative to other types of jobs in 2015. The analysis also shows a shortage for workers in these industry sectors. This analysis shows there may be an oversupply in the areas of *Construction & Maintenance, Production* and *Management & Support* related fields, especially for lower skilled job seekers.

**Table 3: Real Time Labor Market Analysis, South Central 2016**

	Total	Health Care & Related	Business & Sales	Science & Technology	Other Services	Food Service	Transportation	*CIMR	Production	Management & Support
<b>Number of Job Ads</b>	<b>5,010</b>	2,042	819	194	260	179	221	292	161	842
<b>% of Job Ads</b>	<b>100%</b>	40.8%	16.3%	3.9%	5.2%	3.6%	4.4%	5.8%	3.2%	16.8%
<b>Number of Jobseekers</b>	<b>5,407</b>	539	587	100	341	347	463	794	749	1,487
<b>% of Jobs Sought</b>	<b>100%</b>	10.0%	10.9%	1.8%	6.3%	6.4%	8.6%	14.7%	13.9%	27.5%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Food Service Workers, Cashiers, Personal Care Aides* lead the way in total openings. *Loan Interviewers & Clerks, Personal Care Aides*, and *Food Service Workers* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Licensed Practical & Licensed Vocational Nurses* and *Maintenance & Repair Workers* will have the most openings for the **Next** category of occupations. *Supervisors for Food Service, Medical Assistants* and *EMTs & Paramedics* will be the fastest growing **Next** occupations..

For **Later** occupations, *Registered Nurses, General & Operations Managers*, and *K12 Teachers* will have the most openings. *Loan Officers, Registered Nurses* and *Accountants* are the fastest growing **Later** occupations.

**Table 4: South Central Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median
	Employment	Employment	Openings	Openings	Openings	Wage
<b>NOW</b>						
Food Prep. & Serving Workers	2,224	2,797	573	719	1,292	\$17,950
Cashiers	2,463	2,553	90	1,048	1,138	\$18,259
Personal Care Aides	2,520	3,175	655	204	859	\$18,640
Retail Salespersons	1,655	1,729	74	574	648	\$20,733
Laborers & Material Movers	1,486	1,494	8	442	450	\$19,666
<b>NEXT</b>						
Nursing Assistants	1,235	1,308	73	279	352	\$18,530
Licensed Practical & Licensed Vocational Nurses	652	729	77	186	263	\$34,085
Maintenance & Repair Workers	811	848	37	213	250	\$28,696
Heavy & Tractor-Trailer Truck Drivers	1,178	1,204	26	200	226	\$28,780
Retail Sales Supervisors	683	721	38	153	191	\$31,648
<b>LATER</b>						
Registered Nurses	1,748	2,071	323	412	735	\$48,501
General & Operations Managers	1,039	1,139	100	263	363	\$59,801
Elementary School Teachers	1,230	1,309	79	272	351	\$38,372
Middle School Teachers	624	664	40	138	178	\$41,297
Accountants & Auditors	396	456	60	106	166	\$45,510

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

## Table 5: South Central Region Fastest Growing Occupations

### NOW

Loan Interviewers & Clerks  
Personal Care Aides  
Food Prep. & Serving Workers  
Pharmacy Technicians  
Insurance Sales Agents

### NEXT

Food Prep. & Serving Supervisors  
Medical Assistants  
EMTs & Paramedics  
Personal Service Supervisors  
Machinists

### LATER

Loan Officers  
Registered Nurses  
Accountants & Auditors  
General & Operations Managers  
Elementary School Teachers

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2014-2024



## Southeast Region

The Southeast Region consists of 13 counties in the southeast portion of Missouri. The region is home to several major cities including, Cape Girardeau, Sikeston, Caruthersville and Park Hills.

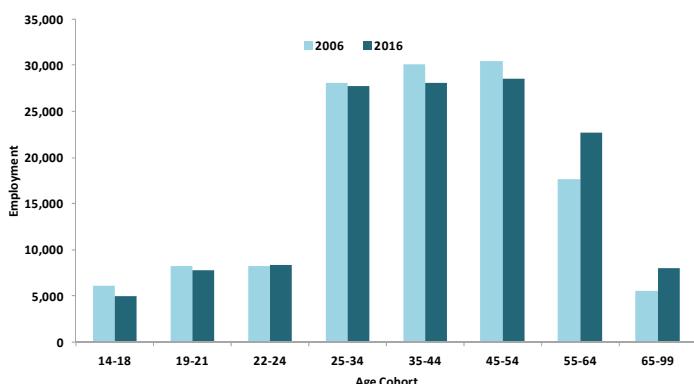
Many of Missouri's major highways cross through the region. Interstate 55 runs north/south through the eastern part of the region, while Interstate 57 travels east/west through the central part. In addition, Highway 60, Highway 61, Highway 62, Highway 67 and Highway 412 cross through the region.

### WORKFORCE DEMOGRAPHICS

The Southeast Region workforce has over 137,000 employees, making up 5 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

The workforce is getting older in the Southeast Region, a trend occurring throughout Missouri. In 2016, 23 percent of the workforce was age 55 or older, up from 17 percent a decade earlier.

#### Southeast Region Workforce Age



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

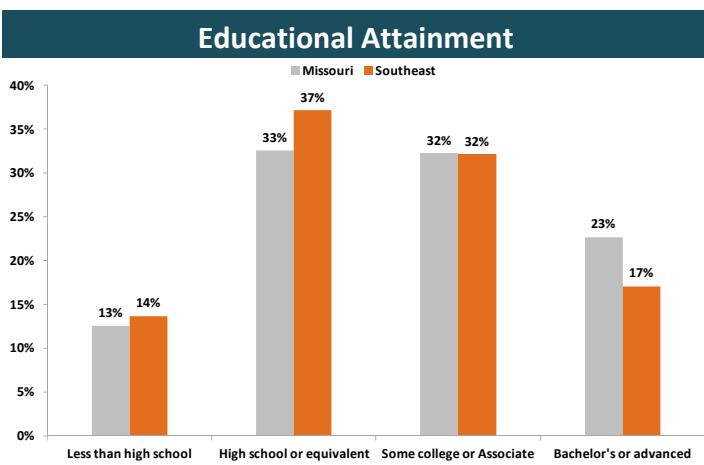


In 2016, 52 percent of the workforce was female and 48 percent was male, which compares to a 50/50 split for Missouri. For the Region, 10 percent of the workforce was non-white, compared to 15 percent for the state; 2 percent was Hispanic or Latino, compared to 4 percent for Missouri.

For the Southeast Region, the primary language spoken at home is something other than English for 3 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 22 percent for the US. The Southeast Region has a higher percentage of the population with a disability compared to the state and nation. For the Region, 18 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the

US. These two groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Southeast Region workforce are below that of Missouri. Seventeen percent of the region's workforce has a bachelor's or advanced degree, compared to 23 percent for Missouri.

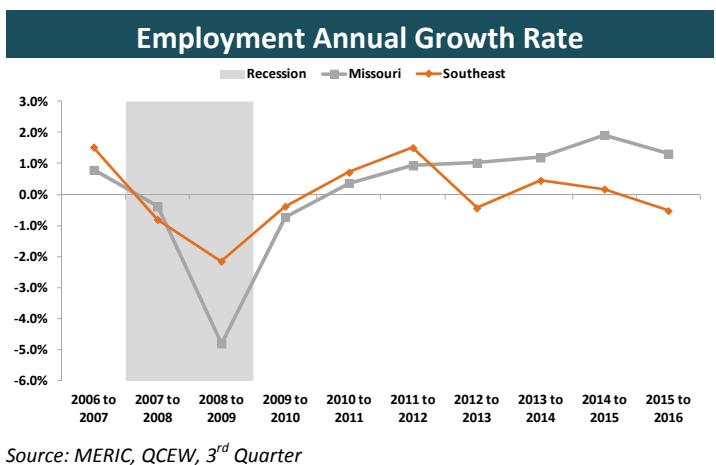


Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

## INDUSTRY ANALYSIS

In 2016, employment in the Southeast Region was over 137,000. Employment in the region fell 0.5 percent from 2015 to 2016, losing over 700 jobs. Missouri employment grew 1.3 percent in that time. From 2011 to

2016, the region averaged 0.2 percent employment growth per year, compared to 1.3 percent for Missouri.



Leading the way in employment growth in the area, for 2016, was *Accommodation and Food Services*, adding nearly 400 jobs. That is the third consecutive year where the industry added more than 250 jobs. *Health Care & Social Assistance* and *Professional, Scientific & Technical Services* added over 300 jobs each in 2016.

*Health Care & Social Assistance* added the most jobs to the regional economy from 2011 to 2016, adding 2,938 jobs. *Accommodation & Food Services* added over 1,000 jobs in the five year period.

**Table 1: Southeast Region Top Industries by Employment**

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	27,493	30,431	2,938	2%	\$33,836
Retail Trade	17,677	18,521	844	1%	\$24,083
Manufacturing	18,606	18,057	(549)	-1%	\$44,901
Accommodation & Food Services	10,211	11,295	1,084	2%	\$14,241
Educational Services	7,982	8,286	305	1%	\$33,856
Public administration	7,219	7,112	(107)	0%	\$32,639
Construction	6,080	6,238	158	1%	\$44,096
Transportation & Warehousing	5,570	6,233	663	2%	\$47,489
Wholesale Trade	5,665	5,577	(87)	0%	\$46,642
Finance & Insurance	4,157	4,048	(110)	-1%	\$41,359

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

*Manufacturing* lost nearly 1,000 jobs from 2015 to 2016. That reverses growth in Manufacturing from 2015 in the region when it added 650 jobs. *Administrative & Support Services* lost 500 jobs from 2015 to 2016. From 2011 to 2016, *Administrative & Support Services* lost 1,084 jobs, averaging a 5 percent decrease in employment per year.

### **Location Quotient**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average. The Southeast Region has high concentrations in *Mining* and advanced manufacturing, including *Plastics & Rubber Manufacturing*, *Paper Manufacturing*, and *Furniture Manufacturing*, among others.

**Table 2: Southeast Region Location Quotients**

Industry	Employment	Location Quotient
Mining	1,312	7.6
Plastics & Rubber Products Mfg.	2,538	3.8
Paper Mfg.	1,300	3.7
Crop Production	2,074	3.5
Furniture & Related Product Mfg.	1,189	3.2
Wood Product Mfg.	1,194	3.2
Gasoline Stations	2,647	3.0
Nonmetallic Mineral Product Mfg.	1,046	2.7
Social Assistance	8,356	2.5
Food Mfg.	3,291	2.2
Truck Transportation	2,715	2.0

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## **LABOR MARKET ANALYSIS**

### **Unemployment**

The regional unemployment rate was 5.1 percent in June

### **Largest Employers in Southeast Region**

Top health care employers include **St. Francis Medical**, **Southeast Missouri Hospital** and **Missouri Delta Medical Center**.

Top employing food manufacturers include **Unilever Manufacturing**, **Tyson Chicken**, and **Gilster-Mary Lee**. Major transportation manufacturers include **Trinity Marine Products** and **Faurecia Emissions**. **Proctor & Gamble** and **W.W. Wood Products** also are major manufacturing employers. **Doe Run Resources** is a major mining employer in the Region.

**Southeast Missouri State University** is a large public sector employer in the region.

2017, down from 6.4 percent a year earlier. The downward trend is consistent with that of the state and nation. The unemployment levels in the region are consistently higher than that of much of the rest of Missouri.

### **Labor Supply and Demand**

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Central Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

**Table 3: Real Time Labor Market Analysis, Southeast 2016**

	Total	Health Care & Related	Business & Sales	Science & Technology	Transportation	Food Service	Other Services	*CIMR	Management & Support	Production
<b>Number of Job Ads</b>	<b>10,632</b>	2,926	2,094	376	1,167	742	579	776	1,624	348
<b>% of Job Ads</b>	<b>100%</b>	27.5%	19.7%	3.5%	11.0%	7.0%	5.4%	7.3%	15.3%	3.3%
<b>Number of Jobseekers</b>	<b>10,321</b>	1,032	935	196	1,097	686	627	1,582	2,449	1,716
<b>% of Jobs Sought</b>	<b>100%</b>	10.0%	9.1%	1.9%	10.6%	6.7%	6.1%	15.3%	23.7%	16.6%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

The Real Time Labor Market Analysis shows that *Health Care* and *Business & Sales related* jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage for workers in these industry sectors. There may be an oversupply in the areas of *Management & Support*, *Construction & Maintenance* and *Production* related fields, especially for lower skilled job seekers.

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Cashiers*, *Personal Care Aids*, *Retail Salespeople* and *Food Service Workers* lead the way in total openings. *Insurance Sales Agents*, *Home Health Aides* and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants*, *Maintenance & Repair Workers*, *Truck Drivers* and *Retail Supervisors* will have the most openings for the **Next** category of occupations. *Physical Therapist Assistants*, *Opticians*, and *Preschool Teachers* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses*, *General & Operations Managers*, and *K12 Teachers* will have the

**Table 4: Southeast Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median
	Employment	Employment	Openings	Openings	Openings	Wage
<b>NOW</b>						
Cashiers	4,984	5,288	304	2,121	2,425	\$18,368
Personal Care Aides	6,001	7,734	1,733	485	2,218	\$18,216
Retail Salespersons	4,104	4,495	391	1,422	1,813	\$19,564
Food Prep. & Serving Workers	4,042	4,448	406	1,306	1,712	\$17,878
Waiters & Waitresses	1,924	1,945	21	926	947	\$18,520
<b>NEXT</b>						
Nursing Assistants	3,049	3,371	322	689	1,011	\$20,256
Maintenance & Repair Workers	1,921	2,036	115	503	618	\$31,655
Heavy & Tractor-Trailer Truck Drivers	3,303	3,338	35	562	597	\$40,849
Retail Sales Supervisors	1,777	1,938	161	397	558	\$32,664
Licensed Practical & Licensed Vocational Nurses	1,058	1,121	63	301	364	\$35,780
<b>LATER</b>						
Registered Nurses	4,024	4,760	736	949	1,685	\$53,055
General & Operations Managers	2,649	2,871	222	671	893	\$67,659
Secondary School Teachers	2,196	2,274	78	521	599	\$42,796
Elementary School Teachers	1,456	1,512	56	322	378	\$43,627
Farmers, Ranchers, Agricultural Managers	1,733	1,775	42	295	337	n/a

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

most openings. Health Care professions, including *Physical Therapists, Nurse Practitioners and Occupational Therapists* are the fastest growing **Later** occupations.

**Table 5: Southeast Region  
Fastest Growing Occupations**

**NOW**

Insurance Sales Agents  
Home Health Aides  
Personal Care Aides  
Pharmacy Technicians  
Agricultural Equipment Operators

**NEXT**

Physical Therapist Assistants  
Opticians, Dispensing  
Preschool Teachers  
Industrial Machinery Mechanics  
Farm Equipment Mechanics, Technicians

**LATER**

Physical Therapists  
Nurse Practitioners  
Occupational Therapists  
Computer & Information Systems Managers  
Healthcare Social Workers

Note: Occupations with net increase of less than 30 are omitted.

Source: MERIC Occupational Projections, 2014-2024



## Southwest Region

The Southwest Region is comprised of seven counties in the southwest corner of Missouri. This region is home to several major cities including Joplin and Monett.

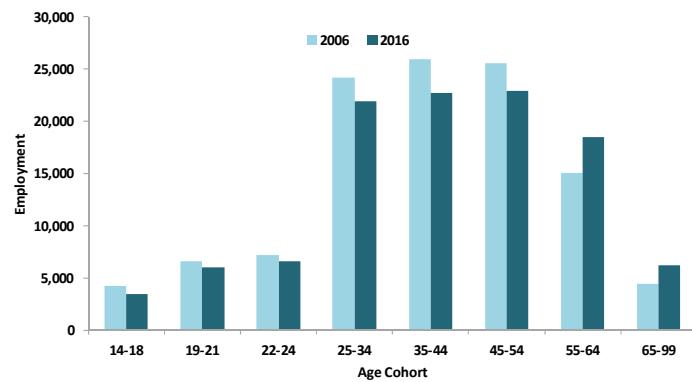
Many of Missouri's major highways cross through this region. Interstate 44 runs east/west through the center of the region. In addition, Highway 60, Highway 160 and Highway 71 cross through the region.

### WORKFORCE DEMOGRAPHICS

The Central Region workforce has over 109,500, making up 4 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

The workforce is getting older in the Southwest Region, a trend happening throughout Missouri. In the Southwest Region in 2016, 23 percent of the workforce was age 55 and older, up from 17 percent a decade earlier.

#### Southwest Region Workforce Age



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

In 2016, 48 percent of the workforce was female and 52 percent was male, which compares to a 50/50 split for female and male workers in Missouri. For the Region, 8



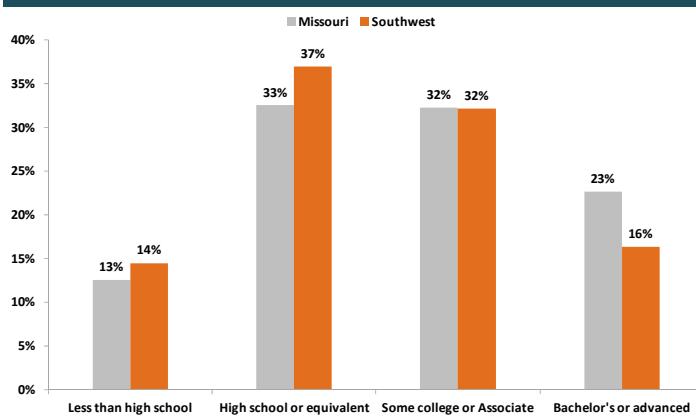
percent of the workforce was non-white, compared to 15 percent for the state; 7 percent was Hispanic or Latino, compared to 4 percent for Missouri.

The primary language spoken at home is something other than English for 8 percent of the population, age 18 to 64. That compares to 7 percent for Missouri and 22 percent for the US. The region has a higher percentage of the population with a disability compared to the state and nation. For the Region, 14 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. Both of these groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

Educational attainment rates for the Southwest Region are below that of Missouri for members of the workforce with a bachelor's or advanced degree. Sixteen percent of

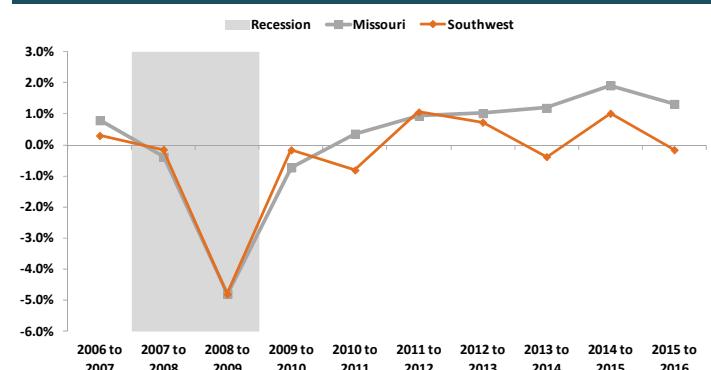
the region's workforce has a bachelor's degree compared to 23 percent for the state.

### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### Employment Annual Growth Rate



consecutive year where it has led the region in job creation. *Accommodation & Food Services* added over 250 jobs and *Construction* added 230.

From 2011 to 2016, *Professional, Scientific & Technical Services* added 1,487 jobs, averaging 13 percent growth. Most of that growth occurred in 2012. *Retail Trade* added 1,280 jobs in that five year period, with 1,237 added in 2015 and 2016.

*Manufacturing* lost 470 jobs in 2016, reversing last years employment growth in the industry for the Southwest Region. From 2011 to 2016, *Manufacturing* employment is down a net 119 jobs.

Table 1: Southwest Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Manufacturing	22,395	22,276	(119)	0%	\$43,861
Health Care & Social Assistance	15,316	16,303	988	1%	\$41,928
Retail Trade	14,015	15,295	1,280	2%	\$25,157
Accommodation & Food Services	8,782	9,333	551	1%	\$14,207
Transportation & Warehousing	7,761	7,382	(379)	-1%	\$49,697
Educational Services	6,402	6,398	(4)	0%	\$33,290
Admin & Support Services	5,222	5,446	224	1%	\$24,831
Construction	4,156	4,448	292	1%	\$43,202
Wholesale Trade	3,845	3,984	139	1%	\$42,429
Professional, Scientific, & Technical Services	1,745	3,233	1,487	13%	\$67,385

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

### Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The Southwest Region has high concentrations in manufacturing, including: *Food Manufacturing, Electrical Equipment & Appliance Manufacturing, Furniture Manufacturing* and *Fabricated Metal Product Manufacturing*. It also has a concentration in *Truck Transportation*.

**Table 2: Southwest Region Location Quotients**

Industry	Employment	Location Quotient
Food Mfg.	8,649	6.9
Electrical Equip., & Appliance Mfg.	1,429	4.7
Truck Transportation	5,073	4.3
Furniture & Related Product Mfg.	1,308	4.2
Fabricated Metal Product Mfg.	3,486	3.1
Gasoline Stations	2,017	2.7
General Merchandise Stores	4,708	1.9
Hospitals	5,700	1.4
Bldg. Material & Garden Equip. Dealers	1,450	1.4
Motor Vehicle & Parts Dealers	2,218	1.4
Warehousing & Storage	1,010	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## LABOR MARKET ANALYSIS

### Unemployment

The regional unemployment rate was 3.9 percent, down from 4.9 percent a year earlier. The falling unemployment rates mirrors state and national trends and shows a tightening of the labor market.

### Largest Employers in Southwest Region

Top Health Care employers include **Freeman Health System** and **Mercy Hospital**.

Top employing food manufacturers include **Tyson, Simmons Prepared Foods, George's Processing** and **Butterball**. Other major manufacturers include **EFCO Corp, La-Z-Boy, Leggett & Platt** and **Eaglepicher Technologies**. **Jack Henry & Associates** is a major employer in the Computer Systems Design field.

**Missouri Southern State University** is a major public sector employer in the region.

### Labor Supply and Demand

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the Central Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Analysis shows that *Business & Sales* and *Health Care* related jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage for workers in these industry sectors. There may be an oversupply in the areas of *Construction & Maintenance, Management & Support* and *Production* related jobs, especially for lower skilled job seekers.

**Table 3: Real Time Labor Market Analysis, Southwest 2016**

	Total	Business & Sales	Health Care & Related	Transportation	Science & Technology	Other Services	Food Service	*CIMR	Management & Support	Production
Number of Job Ads	12,978	2,603	2,342	1,983	748	738	826	1,009	2,133	596
% of Job Ads	100%	20.1%	18.0%	15.3%	5.8%	5.7%	6.4%	7.8%	16.4%	4.6%
Number of Jobseekers	5,988	555	456	521	173	345	408	921	1,619	989
% of Jobs Sought	100%	9.3%	7.6%	8.7%	2.9%	5.8%	6.8%	15.4%	27.0%	16.5%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Retail Salespersons Cashiers*, and *Food Service Workers* lead the way in total openings.

*Personal Care Aides, Computer-Controlled Machine Tool Operators* and *Home Health Aides* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Supervisors for Retail, Teacher Assistants* and *Maintenance & Repair Workers* will have the most openings for the **Next** category of occupations. *Physical Therapist Assistants, Computer User Support Specialists* and *Industrial Machinery Mechanics* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses, General & Operations Managers*, and *K12 Teachers* will have the most openings. *Software Developers, Physical Therapists* and *Computer System Analysts* are the fastest growing **Later** occupations.

**Table 4: Southwest Region Long-Term Occupational Projections**

Occupation	2014 Est. Employment	2024 Proj. Employment	Growth Openings	Replacement Openings	Total Openings	Median Wage
<b>NOW</b>						
Retail Salespersons	4,033	4,135	102	1,398	1,500	\$19,627
Cashiers	2,926	3,086	160	1,245	1,405	\$18,522
Food Prep. & Serving Workers	3,201	3,539	338	1,034	1,372	\$17,988
Waiters & Waitresses	1,664	1,699	35	801	836	\$18,160
Personal Care Aides	1,799	2,317	518	146	664	\$18,579
<b>NEXT</b>						
Nursing Assistants	1,546	1,652	106	349	455	\$22,091
First-Line Supervisors of Retail Sales Workers	1,570	1,657	87	351	438	\$35,283
Teacher Assistants	1,153	1,305	152	276	428	\$18,737
Maintenance & Repair Workers	1,355	1,402	47	355	402	\$30,445
Food Prep. & Serving Workers Supervisors	832	919	87	247	334	\$26,497
<b>LATER</b>						
Registered Nurses	2,695	3,017	322	636	958	\$47,162
General & Operations Managers	1,748	1,861	113	442	555	\$68,261
Substitute Teachers	1,547	1,745	198	292	490	\$21,979
Elementary School Teachers	1,272	1,426	154	281	435	\$39,625
Secondary School Teachers	965	1,080	115	229	344	\$41,639

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

**Table 5: Southwest Region  
Fastest Growing Occupations**

**NOW**

Personal Care Aides  
Computer-Controlled Machine Tool Operators  
Home Health Aides  
Social & Human Service Assistants  
Farmworkers

**NEXT**

Physical Therapist Assistants  
Computer User Support Specialists  
Industrial Machinery Mechanics  
Preschool Teachers, Except Special Education  
Cooks, Restaurant

**LATER**

Software Developers, Applications  
Physical Therapists  
Computer Systems Analysts  
Occupational Therapists  
Nurse Practitioners

Note: Occupations with net increase of less than 30 are omitted.

Source: *MERIC Occupational Projections, 2014-2024*



## St. Louis Region

The St. Louis Region is comprised of five counties and is located in the east central part of Missouri. The region is home to several major cities including, Arnold, Washington, St. Charles, St. Peters, Florissant, O'Fallon, Chesterfield and the City of St. Louis.

As a major metropolitan area, many of Missouri's major roads cross through the region, including interstate 70, Interstate 44, Interstate 55 and Interstate 64. In addition, Highway 50, Highway 40, Highway 61 and Highway 67 cross through the region.

### WORKFORCE DEMOGRAPHICS

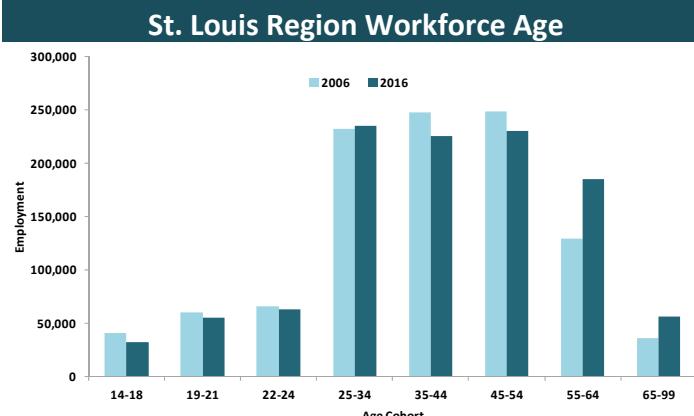
The St. Louis Region workforce has over 1,054,000 employees, making up 38 percent of Missouri employment. In this report, workforce is defined as a count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

The workforce is getting older in the St. Louis Region, a trend occurring throughout Missouri. In the St. Louis Region in 2016, 22 percent of the workforce was age 55 or older, up from 16 percent a decade earlier.



In 2016, 50 percent of the workforce was female and 50 percent was male, which matches the split between females and males in the workforce in Missouri. For the Region, 21 percent of the workforce is non-white, compared to 15 percent for the state; 3 percent was Hispanic or Latino, compared to 4 percent for Missouri.

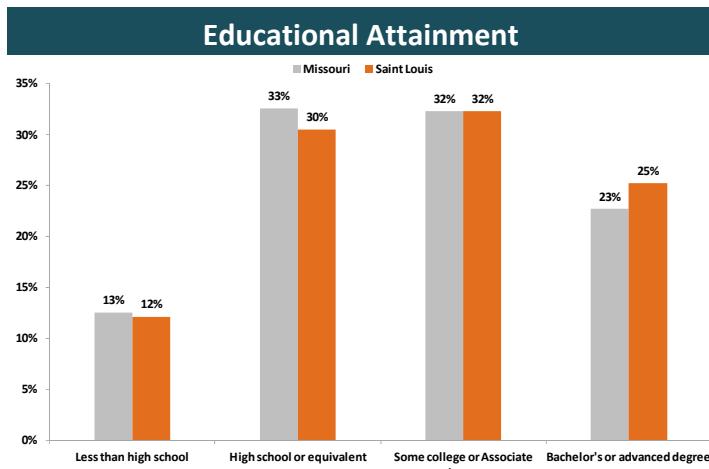
For the St. Louis Region, the primary language spoken at home is something other than English for 8 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 21 percent for the US. The St. Louis Region has a lower percentage of the population with a disability compared to the state and nation. For the Region, 10 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. These two groups may face barriers to employment, and as a result, may fill lower skilled and lower wage jobs.



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

Educational attainment rates for the St. Louis Region workforce are ahead of those for the entire state in

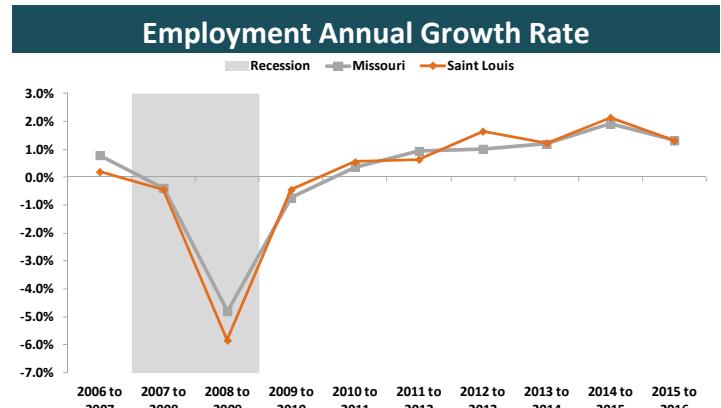
regards to bachelor's or advanced degrees. Twenty-five percent of the region's workforce has a bachelor's or advanced degree compared to 23 for the state.



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

## INDUSTRY ANALYSIS

In 2016, employment in the St. Louis Region was over 1,054,000. Employment in the region grew 1.3 percent from 2015 to 2016, adding 13,690 new jobs. Missouri employment grew 1.3 percent in that time. From 2011 to 2016, the St. Louis Region averaged 1.4 percent employment growth per year, compared to 1.3 percent from the state.



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

*Health Care & Social Assistance* led the region in job growth for the second consecutive year, adding nearly 5,200 jobs in 2016. From 2011 to 2016, the region has averaged 3 percent growth in employment in *Health Care & Social Assistance*, on average, adding more than 4,350 per year.

The *Construction* industry added nearly 3,000 jobs in 2016, the third time in four years the industry added at least 2,000 jobs. *Professional, Scientific & Technical Services* added over 2,300 jobs—this industry has added over 6,800 jobs from 2011 to 2016.

*Accommodation and Food Services* has also been a one of the fastest growing industries in the region over the past

Table 1: St. Louis Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	157,274	179,133	21,859	3%	\$49,749
Retail Trade	104,835	109,217	4,382	1%	\$30,283
Accommodation & Food Services	88,736	101,118	12,381	3%	\$18,312
Manufacturing	85,141	92,452	7,311	2%	\$68,898
Admin & Support Services	63,542	68,734	5,192	2%	\$39,470
Educational Services	64,676	65,584	908	0%	\$46,591
Professional, Scientific, & Technical Services	57,175	64,017	6,843	2%	\$76,692
Finance & Insurance	52,058	55,329	3,270	1%	\$77,374
Construction	47,320	53,528	6,208	2%	\$61,614
Wholesale Trade	44,152	46,159	2,007	1%	\$69,376

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

five years, adding over 12,300 jobs. *Administrative & Support Services* lost over 1,250 jobs in 2016, reversing a three year trend of relatively high job growth within the industry.

### **Location Quotient**

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographical region, in relation to the nation, with 1.0 being the national average.

The St. Louis Region has high concentrations in *Data Processing & Hosting, Management of Companies, Transportation Manufacturing, Chemical Manufacturing and Telecommunications*.

**Table 2: St. Louis Region Location Quotients**

Industry	Employment	Location Quotient
Data Processing & Hosting	5,612	2.4
Mgmt. of Companies & Enterprises	39,389	2.2
Transportation Equip. Mfg.	22,039	1.7
Chemical Mfg.	10,954	1.7
Telecommunications	10,592	1.7
Hospitals	63,252	1.6
Securities & Commodity Contracts	11,657	1.6
Machinery Mfg.	11,552	1.4
Printing & Related Support Activities	4,799	1.4

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

## **LABOR MARKET ANALYSIS**

### **Unemployment**

The regional unemployment rate was 3.7 percent in June 2017, down from 4.7 percent a year earlier. This mirrors state and national trends, showing a tightening of the

### **Largest Employers in the St. Louis Region**

Top employers within health care include **Barnes-Jewish Hospital, St. Mary's Hospital, Mercy Hospital, St. Luke's Hospital** and **Missouri Baptist Medical Center**.

Headquarters operations such as **Anheuser-Busch, Monsanto, Express Scripts, and Enterprise**, manufacturers **General Motors, Boeing** and **Nestle Purina**, and financial services providers **Edward Jones** and **Wells Fargo** rank among the top employers in their industry sectors.

**St. Louis University, Washington University** and the **University of Missouri, St. Louis** are also major employers in the region.

labor market. From June 2012 to June 2017, the unemployment rate dropped 3.2 percentage points.

### **Labor Supply and Demand**

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the St. Louis Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows that *Science & Technology, Business & Sales* and *Health Care* related

**Table 3: Real Time Labor Market Analysis, Saint Louis Region 2016**

	Total	Science & Technology	Business & Sales	Health Care & Related	Other Services	Food Service	Transportation	Production	Management & Support	*CIMR
Number of Job Ads	170,775	29,157	35,434	29,752	9,005	8,507	10,242	4,190	37,420	7,068
% of Job Ads	100%	17.1%	20.7%	17.4%	5.3%	5.0%	6.0%	2.5%	21.9%	4.1%
Number of Jobseekers	28,739	1,366	3,083	2,935	1,634	1,990	2,526	2,914	8,628	3,663
% of Jobs Sought	100%	4.8%	10.7%	10.2%	5.7%	6.9%	8.8%	10.1%	30.0%	12.7%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage for workers in these industry sectors. This analysis shows an oversupply in the areas of *Management & Support, Production* and *Construction & Maintenance* related fields, especially for lower skilled job seekers.

### **Occupational Projections**

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations, *Retail Salespersons, Food Service Workers and Waiters & Waitresses* lead the way in total openings. *Home Health Aides and Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Cooks, Supervisors of Food Service Workers and Maintenance & Repair Workers* will have the most openings for the **Next** category of occupations. *Occupational Therapist Assistants, Physical Therapist Assistants and Web Developers* are the fastest growing **Next** occupations.

**Table 4: St. Louis Region Long-Term Occupational Projections**

Occupation	2014 Est. Employment	2024 Proj. Employment	Growth Openings	Replacement Openings	Total Openings	Median Wage
<b>NOW</b>						
Retail Salespersons	31,343	32,121	778	10,864	<b>11,642</b>	\$21,544
Combined Food Preparation & Serving Workers	26,669	29,468	2,799	8,618	<b>11,417</b>	\$18,529
Waiters & Waitresses	21,768	22,155	387	10,474	<b>10,861</b>	\$18,245
Cashiers	22,432	22,726	294	9,544	<b>9,838</b>	\$19,343
Customer Service Representatives	22,639	24,397	1,758	5,575	<b>7,333</b>	\$34,015
<b>NEXT</b>						
Nursing Assistants	15,218	16,751	1,533	3,437	<b>4,970</b>	\$23,909
Cooks, Restaurant	9,431	10,689	1,258	2,495	<b>3,753</b>	\$23,225
Supervisors of Food Prep & Serving Workers	7,966	8,726	760	2,366	<b>3,126</b>	\$28,379
Maintenance & Repair Workers	9,800	10,093	293	2,568	<b>2,861</b>	\$37,052
Supervisors of Retail Sales Workers	11,006	11,156	150	2,460	<b>2,610</b>	\$39,033
<b>LATER</b>						
Registered Nurses	30,019	33,303	3,284	7,083	<b>10,367</b>	\$59,294
General & Operations Managers	20,117	21,360	1,243	5,092	<b>6,335</b>	\$97,468
Accountants & Auditors	11,624	12,628	1,004	3,102	<b>4,106</b>	\$69,616
Elementary School Teachers	8,398	8,704	306	1,857	<b>2,163</b>	\$56,843
Managers, All Other	8,146	8,471	325	1,797	<b>2,122</b>	\$112,290

denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.



For **Later** occupations, *Registered Nurses, General & Operations Managers, and Accountants* will have the most openings. *Personal Financial Advisors, Statisticians* and *Operations Research Analysts* are the fastest growing **Later** occupations.

**Table 5: St. Louis Region  
Fastest Growing Occupations**

**NOW**

Home Health Aides  
Personal Care Aides  
Septic Tank Servicers & Sewer Pipe Cleaners  
Helpers-Brickmasons, Blockmasons, Tile Setters  
Computer-Controlled Machine Tool Operators

**NEXT**

Occupational Therapy Assistants  
Physical Therapist Assistants  
Web Developers  
Diagnostic Medical Sonographers  
Brickmasons & Blockmasons

**LATER**

Personal Financial Advisors  
Statisticians  
Operations Research Analysts  
Interpreters & Translators  
Nurse Practitioners

Note: Occupations with net increase of less than 50 are omitted.

Source: MERIC Occupational Projections, 2014-2024



## West Central Region

The West Central Region is comprised of 13 counties in the west central part of Missouri. This region is home to major cities including Warrensburg, Sedalia, Lexington, Clinton and Nevada.

Many of Missouri's major highways cross through the region. Interstate 70 runs through the northern part of the region. In addition, Highway 50, Highway 54 and Highway 24 cross east/west through the region, while Highway 65 and Highway 71 run north/south.

### WORKFORCE DEMOGRAPHICS

The West Central Region workforce has over 81,700 employees, making up 3 percent of Missouri employment. In this report, workforce is defined as the count of all employees as reported in the Quarterly Census of Employment and Wages in the 3rd quarter of 2016.

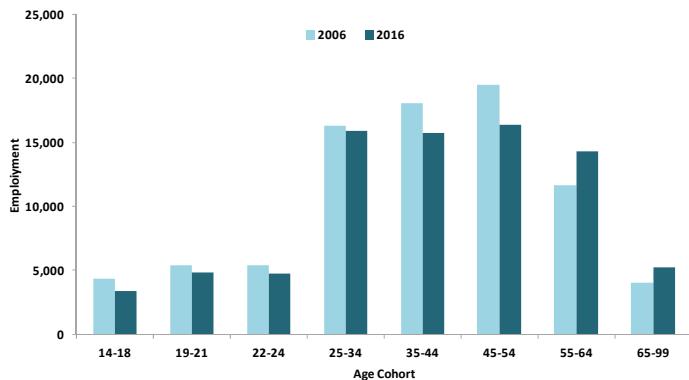
The workforce is getting older in the West Central Region, a trend occurring throughout Missouri. In the West Central region in 2016, 24 percent of the workforce was age 55 or older, up from 19 percent a decade earlier.



In 2016, 52 percent of the workforce was female and 48 percent was male, which compares to a 50/50 split for Missouri. For the Region, 7 percent of the workforce was non-white; compared to 15 percent for the state; 4 percent was Hispanic or Latino, which matches Missouri.

For the West Central Region, the primary language spoken at home is something other than English for 5 percent of the population age 18 to 64. That compares to 7 percent for Missouri and 21 percent for the US. The West Central Region has a higher percentage of the population with a disability compared to the state and nation. For the Region, 16 percent of the population has a disability compared to 13 percent in Missouri and 10 percent in the US. These two groups may face barriers to employment and as a result may fill lower skilled and lower wage jobs.

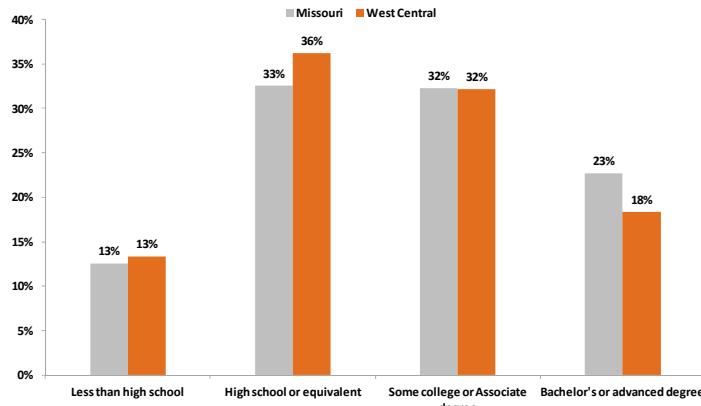
#### West Central Region Workforce Age



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

Educational attainment rates for the West Central Region workforce are behind those of the entire state in regards to bachelor's or advanced degrees. Eighteen percent of the region's workforce has a bachelor's or advanced degree, compared to 23 percent for the state.

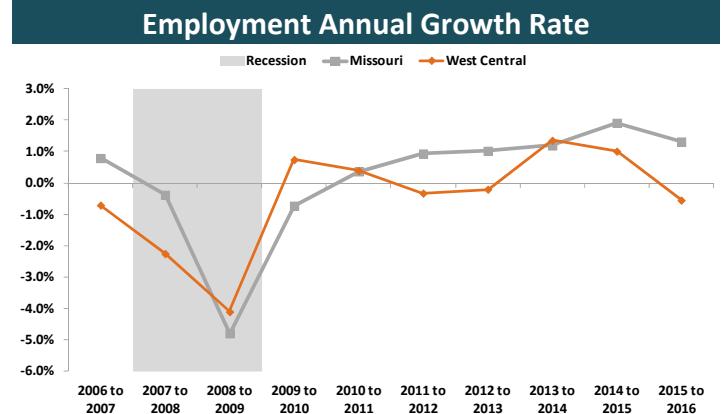
### Educational Attainment



Source: US Census Bureau, LEHD, 3<sup>rd</sup> Quarter 2016

### INDUSTRY ANALYSIS

In 2016, employment in the West Central Region was over 81,700. Employment in the region fell 0.6 percent from 2015 to 2016, losing 450 jobs. From 2011 to 2016, the region averaged 0.3 percent annual employment growth, compared to 1.3 percent for Missouri.



Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

*Retail Trade* led the way in employment growth for the region in 2016, adding 193 jobs. *Management of Companies* added 98 jobs.

From 2011 to 2016, *Health Care & Social Assistance* added 696 jobs, the most among all industries in the region. Employment growth has stalled over the past two years, as the industry has lost over 240 jobs combined in 2015 and 2016.

*Administrative & Support Services* lost 365 jobs in 2016 and *Construction* lost 230. That is a reversal of recent trends as both industries saw employment gains from 2012 to 2015.

Table 1: West Central Region Top Industries by Employment

Industry	2011 Employment	2016 Employment	Net Change	2011-2016 Employment CAGR	2016 Average Annual Wages
Health Care & Social Assistance	15,194	15,890	696	1%	\$32,684
Manufacturing	11,649	11,544	(106)	0%	\$43,164
Retail Trade	10,897	11,367	470	1%	\$23,844
Accommodation & Food Services	7,211	7,295	84	0%	\$12,707
Educational Services	7,258	6,971	(287)	-1%	\$35,118
Public administration	5,125	5,123	(2)	0%	\$36,353
Construction	3,327	3,461	134	1%	\$39,155
Wholesale Trade	2,493	2,736	243	2%	\$42,345
Finance & Insurance	2,675	2,702	28	0%	\$47,595
Transportation & Warehousing	2,385	2,467	82	1%	\$39,815

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter

### Location Quotient

To understand the major industries within a region, an analysis of industry concentration or clustering can be useful. The Location Quotient describes the concentration of an industry in a geographic region, in relation to the nation, with 1.0 being the national average.

The West Central Region has high concentrations in advanced manufacturing, including *Food Manufacturing*, *Machinery Manufacturing* and *Fabricated Metal Product Manufacturing*.

**Table 2: West Central Region Location Quotients**

Industry	Employment	Location Quotient
Food Mfg.	3,597	4.4
Gasoline Stations	2,010	4.2
Machinery Mfg.	1,409	2.6
Nursing & Residential Care Facilities	4,143	2.4
Fabricated Metal Product Mfg.	1,472	2.0
Bldg. Material & Garden Equip. Dealers	1,274	1.9
Social Assistance	3,116	1.7
General Merchandise Stores	2,722	1.7
Motor Vehicle & Parts Dealers	1,689	1.7

Source: MERIC, QCEW, 3<sup>rd</sup> Quarter 2016

### Largest Employers in the West Central Region

Top Health Care employers include **Bothwell Regional Health Center**, **Fitzgibbon Hospital** and **Western Missouri Medical Center**.

Top employing food manufacturers include **Tyson** and **ConAgra Foods**. Other major manufacturers include **Enersys Energy Products**, **Maxion Wheels**, **Waterloo Industries**, and **3M Company**.

Large public sector employers include **Whiteman Air Force Base** and the **University of Central Missouri**.

### Labor Supply and Demand

Unemployment rates are dependent on the overall economic health and aggregate demand within an economy, but is also influenced by the labor force's ability to meet the demand for jobs within the region. To better understand labor supply and demand in a region, job seeker data is compared to current job advertisement data. *Table 3* provides a count of online job ads in 2016 for the West Central Region and compares it to job seeker data for people registered with [jobs.mo.gov](http://jobs.mo.gov).

The Real Time Labor Market Analysis shows that *Health Care*, *Business & Sales* and *Transportation* related jobs were in high demand relative to other types of jobs in 2016. The analysis also shows a shortage for workers in these industry sectors. There also may be an oversupply in the areas of *Construction & Maintenance*, *Management & Support* and *Production* related fields, especially for lower skilled job seekers.

**Table 3: Real Time Labor Market Analysis, West Central 2016**

	Total	Health Care & Related	Business & Sales	Transportation	Science & Technology	Other Services	Food Service	*CIMR	Management & Support	Production
<b>Number of Job Ads</b>	<b>8,899</b>	2,604	1,391	1,218	424	561	369	674	1,321	337
<b>% of Job Ads</b>	<b>100%</b>	29.3%	15.6%	13.7%	4.8%	6.3%	4.1%	7.6%	14.8%	3.8%
<b>Number of Jobseekers</b>	<b>6,065</b>	611	520	456	150	410	456	964	1,547	951
<b>% of Jobs Sought</b>	<b>100%</b>	10.1%	8.6%	7.5%	2.5%	6.8%	7.5%	15.9%	25.5%	15.7%

Source: Burning Glass Technologies, *Labor Insight* ; Missouri Division of Workforce Development, [jobs.mo.gov](http://jobs.mo.gov)

### Occupational Projections

MERIC produces occupational projections that estimates labor demand over a 10 year period. MERIC categorizes these occupations using its **Now-Next-Later** categorization system to help job seekers understand the training, education and experience requirements for various occupations.

**Now** jobs generally require short to medium term training (12 months on-the-job or classroom training) and no postsecondary education.

**Next** jobs generally require 12 months or more of on-the-job training or combined work experience and/or an associates or some postsecondary education.

**Later** jobs generally require a bachelor's or advanced degree and may also require additional work experience.

For **Now** occupations *Cashiers* and *Food Service Workers* lead the way in total openings. *Molding Machine Setters*,

*Computer-Controlled Machine Tool Operators* and *Personal Care Aides* are projected to be the fastest growing **Now** occupations over the next decade.

*Nursing Assistants, Maintenance & Repair Workers, Supervisors for Retail and Licensed Practical & Vocational Nurses* will have the most openings for the **Next** category of occupations. *Industrial Machinery Mechanics, Machinists, and Cooks* are the fastest growing **Next** occupations.

For **Later** occupations, *Registered Nurses, K12 Teachers* and *General & Operations Managers*, will have the most openings. *Physical Therapists* and *Registered Nurses* are the fastest growing **Later** occupations.

**Table 4: West Central Region Long-Term Occupational Projections**

Occupation	2014 Est.	2024 Proj.	Growth	Replacement	Total	Median
	Employment	Employment	Openings	Openings	Openings	Wages
<b>NOW</b>						
Cashiers	3,098	3,163	65	1,318	1,383	\$18,475
Food Prep. & Serving Workers	2,885	3,070	185	932	1,117	\$18,124
Retail Salespersons	1,983	2,079	96	687	783	\$19,925
Personal Care Aides	1,780	2,250	470	144	614	\$18,421
Waiters & Waitresses	1,076	1,069	0	518	518	\$18,675
<b>NEXT</b>						
Nursing Assistants	2,881	3,029	148	651	799	\$18,958
Maintenance & Repair Workers	1,222	1,291	69	320	389	\$30,891
Supervisors for Retail Sales Workers	1,332	1,392	60	298	358	\$31,970
Licensed Practical & Licensed Vocational Nurses	1,022	1,057	35	291	326	\$34,601
Teacher Assistants	894	959	65	214	279	\$21,861
<b>LATER</b>						
Registered Nurses	1,502	1,743	241	354	595	\$52,350
Elementary School Teachers	1,524	1,619	95	337	432	\$46,887
General & Operations Managers	1,151	1,223	72	291	363	\$67,478
Secondary School Teachers	996	1,054	58	236	294	\$42,089
Accountants & Auditors	387	445	58	103	161	\$53,936

🔥 denotes occupations within the top ten for on-line job ads in 2016 in the region within the respective Now-Next-Later classification.

Source: MERIC Occupational Projections, 2014-2024

**Table 5: West Central Region  
Fastest Growing Occupations**

**NOW**

Molding Machine Setters, Operators, & Tenders  
Computer-Controlled Machine Tool Operators  
Personal Care Aides  
Home Health Aides  
Loan Interviewers & Clerks

**NEXT**

Industrial Machinery Mechanics  
Machinists  
Cooks, Restaurant  
Computer User Support Specialists  
Emergency Medical Technicians & Paramedics

**LATER**

Physical Therapists  
Registered Nurses  
Loan Officers  
Accountants & Auditors  
General & Operations Managers

Note: Occupations with net increase of less than 30 are omitted.

Source: *MERIC Occupational Projections, 2014-2024*

*Source: MERIC Occupational Projections*



# Data Sources

## **Missouri Economy Defined.....pp. 3 - 6**

### Gross Domestic Product

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly GDP by State, real GDP in chained dollars. <http://www.bea.gov/regional/index.htm>

### Personal Income

U.S. Bureau of Economic Analysis. Regional Economic Accounts Data: Interactive Tables, Quarterly State Personal Income. Table SQ1— Personal Income, Population, Per Capita Personal Income; Table SQ4— Personal Income by Major Component; Table SQ35— Personal Current Transfer Receipts. <http://www.bea.gov/regional/index.htm>

MERIC. 2016. *Cost of Living Data Series*. [https://www.missourieconomy.org/indicators/cost\\_of\\_living/index.stm](https://www.missourieconomy.org/indicators/cost_of_living/index.stm)

### Civilian Labor Force

U.S. Census Bureau. Current Population Survey, CPS Table Creator. <http://www.census.gov/cps/data/cpstablecreator.html>

U.S. Dept. of Labor, Bureau of Labor Statistics. Local Area Unemployment Statistics. <https://www.bls.gov/data/#unemployment>

### Employment and Unemployment

U.S. Dept. of Labor, Bureau of Labor Statistics, Local Area Unemployment Statistics. <https://www.bls.gov/data/#unemployment>

US Dept. of Labor, Bureau of Labor Statistics, Current Employment Statistics. <https://www.bls.gov/data/#employment>

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages, micro-data, 2006-2016.

## **Regional Analysis .....pp. 7 - 58**

U.S. Department of Labor, Employment and Training Administration (ETA). The Workforce Innovation and Opportunity Act of 2014. <https://www.dol.gov/wioa/>

### Workforce Demographics

U.S. Census Bureau. Longitudinal Employer Household Dynamics (LEHD). LED Extraction Tool. Worker characteristics by Sex and Age; by Sex and Education by Race and Ethnicity. <http://ledextract.ces.census.gov/>

U.S. Census Bureau. American Community Survey (ACS), 2011-2015 Five-Year Estimates. Disability Characteristics. Table S1810. <http://factfinder.census.gov>

U.S. Census Bureau. American Community Survey (ACS), 2011-2015 Five-Year Estimates. Age by Language Spoken at Home for the Population 5 Years and Over. Table B16007. <http://factfinder.census.gov>.

### Industry Analysis

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Quarterly Census of Employment and Wages (QCEW), 3<sup>rd</sup> Quarter, micro-data.

### Labor Market Analysis

MERIC in cooperation with the U.S. Bureau of Labor Statistics. Local Area Unemployment Statistics (LAUS). Data not seasonally adjusted. <https://www.missourieconomy.org/indicators/laus/default.aspx>

Infogroup<sup>®</sup> Largest Employers from InfoUSA database.

MERIC in cooperation with Burning Glass Technologies. Labor Insight<sup>TM</sup>. [https://www.missourieconomy.org/pdfs/statewide\\_labor\\_supply\\_n\\_demand\\_analysis.pdf](https://www.missourieconomy.org/pdfs/statewide_labor_supply_n_demand_analysis.pdf)

MERIC in cooperation with Missouri Division of Workforce Development. Missouri Jobs. [https://www.missourieconomy.org/pdfs/statewide\\_labor\\_supply\\_n\\_demand\\_analysis.pdf](https://www.missourieconomy.org/pdfs/statewide_labor_supply_n_demand_analysis.pdf)

### Occupational Projections

MERIC in cooperation with the U.S. Dept. of Labor, Bureau of Labor Statistics. Occupational Employment Projections. [https://www.missourieconomy.org/occupations/occ\\_proj.stm](https://www.missourieconomy.org/occupations/occ_proj.stm)



## Appendix I

Missouri Workforce Development Regions by County				
Central	Kansas City	Northeast	Northwest	Ozark
Audrain	Cass	Adair	Andrew	Christian
Boone	Clay	Clark	Atchison	Dallas
Callaway	Jackson	Knox	Buchanan	Greene
Camden	Platte	Lewis	Caldwell	Polk
Cole	Ray	Lincoln	Clinton	Stone
Cooper		Macon	Daviess	Taney
Crawford		Marion	Dekalb	Webster
Dent		Monroe	Gentry	
Gasconade		Montgomery	Grundy	
Howard		Pike	Harrison	
Laclede		Ralls	Holt	
Maries		Randolph	Linn	
Miller		Schuyler	Livingston	
Moniteau		Scotland	Mercer	
Morgan		Shelby	Nodaway	
Osage		Warren	Putnam	
Phelps			Sullivan	
Pulaski			Worth	
Washington				
St. Louis	Southeast	Southwest	South Central	West Central
Franklin	Bollinger	Barry	Butler	Bates
Jefferson	Cape Girardeau	Barton	Carter	Benton
St. Charles	Dunklin	Dade	Douglas	Carroll
St. Louis	Iron	Jasper	Howell	Cedar
St. Louis City	Madison	Lawrence	Oregon	Chariton
	Mississippi	McDonald	Ozark	Henry
	New Madrid	Newton	Reynolds	Hickory
	Pemiscot		Ripley	Johnson
	Perry		Shannon	Lafayette
	Ste. Genevieve		Texas	Pettis
	St. Francois		Wayne	St. Clair
	Scott		Wright	Saline
	Stoddard			Vernon

# 2017

This report was prepared by the staff of the Missouri Economic Research and Information Center (MERIC) as part of the annual Missouri Economic Report found at [https://missourieconomy.org/economic\\_report/index.stm](https://missourieconomy.org/economic_report/index.stm). All data in this report was current at the time of publication and is subject to revision.

### ***About the Missouri Economic Research and Information Center***

The Missouri Economic Research and Information Center (MERIC) provides comprehensive analysis of Missouri's socioeconomic environment at the local, regional and state levels. To achieve this, MERIC employs a wide array of tools, which include econometric models, geographic information systems and advanced statistical methods. On-going projects at MERIC include targeted development, economic and social impact assessments, industry and occupational analyses, career seeker products and information on Missouri's demographic and economic trends.

This workforce solution was funded by a grant awarded by the U.S. Department of Labor's Employment and Training Administration. The solution was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership.

**August 2017**

